Bioterrorism Readiness Suite™ 3.0
Administrator Guide

Table of Contents

Chapter 4 — Setting Up Your Directories

Chapter 5 — Working in the Role Directory

Chapter 6 — Working in the User Directory

Chapter 7 — Generating Reports and Logs

1 Getting Started

Welcome to the BTRS 3.0 Administrator Guide!

BTRS administrators perform additional functions to ensure the efficiency and security of the BTRS portal. These tasks include setting permission levels and assigning user licenses to other BTRS users.

In order to accomplish these important tasks, you must first understand the requirements of the BTRS system, as well as the different types of licenses available and the associated activities each license enables users to perform.

This chapter provides you with information about:

- How this guide has been put together

- What's new in this version of BTRS

- Standards and conventions used in the guide

- Technical aspects of administering the BTRS portal

- Differences between the three user license levels

About This Guide

To make the learning process more efficient for you, information in this guide is presented in a new format. The organization of the book helps you easily gain access to what you need, and then move on with your job.

Where appropriate, this guide provides best practice examples for you to use in your BTRS portal, to help you in making decisions about setting up and administering your directories, Document Library, portal home page, and reports and logs.

How This Guide Has Changed

We realize that you are under a lot of pressure to learn and use BTRS right away. You may even have another process or program in place, so this book needs to be a valuable resource for you.

To make this book useful for you, we made the following changes:

- Organized the information in the guide by the type of task you might perform, rather than by where it is located in the portal

- Kept procedures short and focused so that you can easily remember them, and later build on them

- Made tasks easy to find through a detailed index, glossary, and easy-to-find headings

- Moved the daily end user operations processes into a different book

Deciding Which Book to Use

We decided that the best way to organize and format the documentation was to divide the information into two books—a *User Guide* and an *Administrator Guide*. While both books provide step-by-step instructions, the focus of each is directed at accomplishing different types of tasks.

The *User Guide* is aimed at the day-to-day user operations working through the BTRS portal to collaborate on and post documents, and to send and receive alerts. The *User Guide* contains an overview of BTRS, provides descriptions of its functionality, and shows you how to accomplish specific tasks. In addition, the User Guide provides information on the the terminology and conventions used in the guides.

The *Administrator Guide* focuses on more advanced and technical operations, including:

- Setting up user accounts and permissions, including roles, Organizational Units (OUs), and role groups

- Managing portal content, folders, categories, documents, and discussions

- Generating reports

What's New in This Version

In this version of BTRS, Virtual Alert provides additional alerting and reporting functionalities specifically for BTRS Admins. In addition, several other features have been added for end users. For more information about the new end user features, see "What's New in This Version" in the *User Guide*.

Alerting Functionality

We have made a number of substantial improvements to the BTRS alerting features, both for users and for administrators.

Customizable Administrator Alerting Preferences

BTRS Administrators can now set up a number of global alerting preferences, including the option to continue or stop alerting users after an alert officially expires, to configure the number of minutes between alerting attempts, and to configure the total number of attempts (from 1 to 10) to make to each alerting location. For more information about this feature, see "Managing Alert Settings" in Chapter 2, page 19.

Web-based Messaging Functionality

BTRS now uses Web-based messaging to communicate between the alert sending service and the communications service to execute alerts. Adding this feature enables other software providers to potentially use the BTRS alerting infrastructure to send alerts from their applications.

This feature not only handles, but actively manages, the calling process when an alert is sent, in order to maximize the number of calls made in the shortest period of time. This feature also works in conjunction with the customizable administrator alerting preferences to provide additional flexibility and customization.

Reporting Functionality

BTRS 3.0 provides you with new capability to quickly create data for sending faxes to other BTRS users.

Fax Blast Services Data Export

You can quickly search for and export user fax data so that you can readily create lists that can be provided to external blast-fax vendors for execution.

BTRS Administrators can search the familiar BTRS role directory to select which roles to include in any particular export and choose whether or not to include users who have not entered fax numbers in their profiles. The information can then be exported to a Microsoft® Excel spreadsheet, or saved to a file on your computer in a Comma Separated Value (.csv) format. For more information about this feature, see "Blast Fax Report" in Chapter 7, page 92.

Administering the BTRS Portal

The BTRS portal is managed by users called "BTRS Admins" who administer and oversee the daily operations of the BTRS portal. These administrators have access to areas within the portal that other users do not, and are responsible for handling the management of content on the home page, of folders and categories, and of creating and maintaining user- and role-based information in the directories.

To administer the portal efficiently, you must be able to access the BTRS Admin section. In addition, each user with access to the portal must use a desktop (or laptop) computer with the proper operating system and software installed.

Accessing the BTRS Admin Dashboard

In order to perform administrative functions within BTRS, you must be able to access the BTRS Admin dashboard, or section, of the portal. The BTRS Admin section of the BTRS portal is only visible to those users assigned BTRS Admin licenses. In the BTRS Admin section, you can manage users, roles, and role groups; generate reports; and set folder and category permissions. This guide primarily focuses on those tasks you can perform only if you have a BTRS Admin license.

System Requirements

Each BTRS workstation requires:

- A Microsoft Windows®-based PC running Microsoft® Windows 98 or higher, with all required service packs installed

- Microsoft® Internet Explorer 5.5 or higher, with all required service packs installed

Understanding License Types

Each user in the BTRS system is assigned one of three licenses that correspond to the type of work that user performs within the BTRS portal. These licenses are:

- BTRS Admin

- BTRS Collaborator

- Alerting-level

Administrators

The BTRS Admin license provides the most access to all sections and functionality within the BTRS portal. While each BTRS administrator may have varying management permissions, the license enables administrators to:

- Post content on the home page (based on whether or not the management right is assigned)

  For more information about assigning management rights, see "Assigning Management Rights to Roles" in Chapter 5, page 58.

- Create, update, and view user accounts, Organizational Units (OUs), roles, and role groups (based on the OUs you are assigned to manage)

  For more information about what users, roles, OUs, and role groups are and how they function, see "Making Sense of OUs, Roles, Role Groups, and Users" in Chapter 4, page 37. For more information about assigning OU managers, see "Assigning Managers to Role OUs" in Chapter 5, page 49 and "Assigning Managers to User OUs" in Chapter 6, page 75.

- Set folder access permissions and approval routing (based on the folders you are assigned administrator privileges)

  For more information about setting folder permissions, see "Working with Folder Permissions" in Chapter 3, page 23. For more information about setting up folder approval routing, see "Working with Folder Approval Routing" in Chapter 3, page 26.

- Send, receive, and cancel alerts (based on the roles you can send alerts to)

    For more information about sending, receiving, and canceling alerts, see the *User Guide*. For more information about assigning alertable roles, see "Assigning Alertable Roles to Roles" in Chapter 5, page 55.

Collaborators

BTRS Collaborator licenses enable BTRS users to access and work in the Document Library, and to send and receive alerts. Collaborators, while unable to access the BTRS Admin section, can also:

- Cancel alerts they send

- Be assigned Admin-level folder permissions

- Be assigned as approvers for folders

- In the Directory, view BTRS users':

    - Names and titles

    - Organization name and business category

    - Spoken languages

    - Assigned roles

    - Contact information (based on alertable roles)

- Add and update user profile information

Alerting level Users

The BTRS Alerting level license provides limited access to users in the HAN who need to be alerted. Alerting level users, while unable to access documents on the BTRS portal, can:

- View news and announcements on the BTRS home page

- Receive and view alerts

- In the Directory, view BTRS users':

    - Name and title

    - Organization name and business category

    - Spoken languages

    - Assigned roles

    - Contact information (work phone and e-mail address only)

- Add and update user profile information

2 Managing Portal Content and Settings

In addition to working with users, roles, and role groups, BTRS administrators who have other assigned rights can administer the following sections and settings:

You can manage these items	If you have this application right assigned to your role
News	Can Publish BTRS Home Page Content
Announcements	Can Publish BTRS Home Page Content
Quick Links	Can Publish BTRS Home Page Content
Alert Settings	Can Manage Alert Settings

Each of these items functions globally within the BTRS portal, including the information that appears on the BTRS home page (for all users), as well as the method in which alerts are sent to each user.

As the settings in this chapter affect all BTRS users, be sure that the role assigned these application rights coordinates the management of these duties.

Managing Home Page Content

The home page of your BTRS portal serves as a single location for your users to gather information about current happenings, view active alerts, check on the status of documents posted to the portal, and to quickly access other areas of the portal and outside Web sites. By maintaining and updating your home page content, you can efficiently pass information to your users, and enable them to work productively with minimal effort.

Managing News

The News section of the BTRS home page provides you with a highly-visible area that all users, regardless of license or role permissions, view as soon as they log in. The content in the News section is governed by the **News** folder in the Document Library. All documents you post in the **News** folder appear on the home page. You can also modify the profile for each news item, including the item's description, title, and author; or delete the item when you no longer need it to appear on the home page.

Before you post items in the **News** folder, you must have permission to publish content to the BTRS portal home page. For information about assigning application rights, see "Assigning Application Rights to Roles" in Chapter 5, page 56.

Posting News Items

Items posted in the **News** folder in the Document Library appear on the BTRS home page in the order you post them; the most recent item appears at the top of the list.

The **News** folder does not support document check in/publishing; items that you post to the folder are automatically published. By default, only the five most recently-posted articles appear on the BTRS home page, although all news items are available in the **News** folder in the Document Library. For more information about standard folders, see the *User Guide*.

▶ **To post a news item**

1   On the BTRS navigation bar, click **Document Library**.

The *Document Library* screen appears.

2   Under Documents, click **Portal Content**.

The *Document Library* screen updates to reflect the folder structure.

3   Under Documents, click **News**.

The *Document Library* screen updates to reflect the folder structure.

4   Under the path of the folder, click **Add Document**.

The *Add a document* screen appears.

5   Next to the **Document file name** field, click **Browse**.

BTRS opens the *Choose File* dialog box.

6   Navigate to and select the file you want to post as news.

7   Click **Open**.

BTRS closes the *Choose file* dialog box, and displays the document path in the Document file name field.

8   Click **Continue**.

The *Document Profile* screen appears.

9   In the **Select a profile** list, select **News Item**.

10 In the **Title** field, type the name you want to appear as the document's title.

This information appears in bold on the home page.

11 In the **Author** field, type the name of the person who either created or is responsible for this document.

12 In the **Description** field, type any comments or introductory information about this document that will help others to identify it.

This information displays under the name of the document when it is posted.

13 Click **Save**.

The *Document Library* screen appears and displays your document as published. The News section of the home page displays the news item at the top of the list.

*If you enter document properties information in Microsoft® Word, Excel, PowerPoint, and Visio, the information automatically populates the **Title**, **Author**, and **Description** fields.*

Modifying News Items

After you publish a news item to the BTRS home page, you can modify the document's profile, or post an updated version of the document.

▸   **To update a news item profile**

*The following steps assume you have navigated to **Document Library** | **Portal Content** | **News**.*

1   In the **News** folder, locate the document for which you want to update the profile.

2   Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.

3   Under Actions, click **Edit Profile**.

The *Document Profile s*creen appears.

4   Modify the document profile as necessary.

5   Click **Save**.

The *Document Inspection* screen appears and displays the updated information.

▸   **To post an updated news item**

1   In the **News** folder, locate the document for which you want to update the profile.

2   Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.

3   Under Actions, click **Update File**.

The *Update a document* screen appears.

4   Next to the **Document file name** field, click **Browse**.

BTRS opens the *Choose file* dialog box.

5   Navigate to and select the updated news file.

6   Click **Open**.

BTRS closes the *Choose file* dialog box, and displays the document path in the Document file name field.

7   Click **Continue**.

The *Document Profile* screen appears.

8   Update the document profile as necessary.

9   Click **Save**.

The *Document Inspection* screen displays the updated information.

Deleting News Items

When you no longer need to display a news item on the BTRS home page, you can delete it from the Document Library.

You must remove the document from the **News** folder to remove it from the News section of the home page. In addition, deleting documents from the **News** folder removes the item from the Document Library completely. If you want to archive the item in another folder, you need to publish the document in that folder.

▶ **To delete a news item**

The following steps assume you have navigated to **Document Library | Portal Content | News**.

1   In the **News** folder, locate the document for which you want to update the profile.

2   Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.

3   Under Actions, click **Delete**.

BTRS displays the message, "Are you sure you want to delete this document?"

4   Click **OK**.

BTRS deletes the news item from the Document Library. The news item no longer appears on the BTRS home page.

Managing Announcements

The Announcements section of the BTRS home page provides you with a highly-visible area that all users, regardless of license or role permissions, view as soon as they log in. The content in the Announcements section is governed by the **Announcements** folder in the Document Library. All documents you post in the **Announcements** folder appear on the home page. You can also modify the profile for each announcement, including the item's description, title, and author; or delete the announcement when you no longer need it to appear on the home page.

Before you post items in the **Announcements** folder, you must have permission to publish content to the BTRS portal home page. For information about assigning application rights, see "Assigning Application Rights to Roles" in Chapter 5, page 56.

Posting Announcements

Items posted in the **Announcements** folder in the Document Library appear on the BTRS home page in the order you post them; the most recent item appears at the top of the list.

The **Announcements** folder does not support document check in/publishing; items that you post to the folder are automatically published. For more information about standard folders, see the *User Guide*.

▶ **To post an announcement**

1   On the BTRS navigation bar, click **Document Library**.

The *Document Library* screen appears.

2   Under Documents, click **Portal Content**.

The *Document Library* screen updates to reflect the folder structure.

3   Under Documents, click **Announcements**.

The *Document Library* screen updates to reflect the folder structure.

4   Under the path of the folder, click **Add Document**.

The *Add a document* screen appears.

5   Next to the **Document file name** field, click **Browse.**

BTRS opens the *Choose file* dialog box.

6   Navigate to and select the file you want to post.

7   Click **Open**.

BTRS closes the *Choose file* dialog box, and displays the document path in the Document file name field.

8   Click **Continue**.

The *Document Profile* screen appears.

9   In the **Select a profile** list, select **Announcement**.

10   In the **Title** field, type the name you want to appear as the document's title.

This information appears in bold on the home page.

If you enter document properties information in Microsoft® Word, Excel, PowerPoint, and Visio, the information automatically populates the **Title**, **Author**, and **Description** fields.

11   In the **Author** field, type the name of the person who either created or is responsible for this document.

12   In the **Description** field, type any comments or introductory information about this document that will help others to identify it.

This information displays under the name of the document when it is posted.

13   Click **Save**.

The *Document Library* screen appears and displays your document as published. The Announcements section of the home page displays the announcement at the top of the list.

Modifying Announcements

After you publish an announcement to the BTRS home page, you can modify the document's profile, or post an updated version of the document.

The following steps assume you have navigated to **Document Library | Portal Content | Announcements**.

▶   **To update an announcement profile**

1   In the **Announcements** folder, locate the document for which you want to update the profile.

2   Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.

3   Under Actions, click **Edit Profile**.

The *Document Profile* screen appears.

4   Modify the document profile as necessary.

5   Click **Save**.

The *Document Inspection* screen displays the updated information.

▶   **To post an updated announcement**

1   In the **Announcements** folder, locate the document for which you want to update the profile.

2   Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.

3   Under Actions, click **Update File**.

The *Update a document* screen appears.

4   Next to the **Document file name** field, click **Browse**.

BTRS opens the *Choose file* dialog box.

5   Navigate to and select the updated announcement file.

6   Click **Open**.

BTRS closes the *Choose file* dialog box, and displays the document path in the Document file name field.

7   Click **Continue**.

The *Document Profile* screen appears.

8   Update the document profile as necessary.

9   Click **Save**.

The **Document Inspection** screen displays the updated information.

Deleting Announcements

When you no longer need to display an announcement on the BTRS home page, you can delete it from the Document Library.

You must remove the document from the **Announcements** folder to remove it from the Announcements section of the home page. In addition, deleting documents from the **Announcements** folder removes the item from the Document Library completely. If you want to archive the item in another folder, you need to publish the document in that folder.

▸ **To delete an announcement**

The following steps assume you have navigated to **Document Library | Portal Content | Announcements**.

1   In the **Announcements** folder, locate the document you want to delete.

2   Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.

3   Under Actions, click **Delete**.

BTRS displays the message, "Are you sure you want to delete this document?"

4   Click **OK**.

BTRS deletes the announcement from the Document Library. The announcement no longer appears on the BTRS home page.

Managing Quick Links

For more information about the types of licenses in BTRS, see "Understanding License Types" in Chapter 1, page 4.

The Quick Links section of the BTRS home page provides users with Collaborator and BTRS Admin licenses with access to Web sites frequently accessed by your HAN. Users with Alerting Level licenses do not see the Quick Links section. The links in the Quick Links section is governed by the **Quick Links** folder in the Document Library. All Web addresses (URLs) you post in the **Quick Links** folder appear on the home page. You can also update the profile for each link, including the link's description, address, title, and categories; or delete the link when you no longer need it to appear on the home page.

Before you can post links in the **Quick Links** folder, you must have permission to publish content to the BTRS portal home page. For information about assigning application rights, see "Assigning Application Rights to Roles" in Chapter 5, page 56.

Adding Quick Links

Items posted in the **Quick Links** folder in the Document Library appear on the BTRS home page in alphabetical order.

The **Quick Links** folder does not support document check in/publishing; items that you post to the folder are automatically published.

▶ **To add quick links**

1   On the BTRS navigation bar, click **Document Library**.

The *Document Library* screen appears.

2   Under Documents, click **Portal Content**.

The *Document Library* screen updates to reflect the folder structure.

3   Under Documents, click **Quick Links**.

The *Document Library* screen updates to reflect the folder structure.

4   Under the path of the folder, click **Add Document**.

The *Add a document* screen appears.

5   Next to the **Document file name** field, click **Browse**.

BTRS opens the *Choose file* dialog box.

6   Navigate to and select the file you want to post.

Because BTRS uses the URL you enter in the **Link** field to locate the web site rather than the file you select here, you may upload any file for this process. For example, you can use a graphic or an empty Microsoft® Word document.

7   Click **Open**.

BTRS closes the *Choose file* dialog box, and displays the document path in the Document file name field.

8   Click **Continue**.

The *Document Profile* screen appears.

9   In the **Select a profile** list, select **Web Link**.

10   In the **Link** field, type the complete URL of the Web site to which you want the link to go.

If you enter document properties information in Microsoft® Word, Excel, PowerPoint, and Visio, the information automatically populates the **Title**, **Author**, and **Description** fields.

11   In the **Title** field, type the name you want to appear as the title of the web site.

This information appears in bold on the home page.

12   In the **Description** field, type any comments or introductory information about this document that will help others to identify it.

This information displays under the name of the document in the **Quick Links** folder, and as a tool tip when you rollover the link on the BTRS home page.

13 In the **Categories** list, select one or more categories in which you want the link to appear.

Press **CTRL** while clicking to select more than one item. To deselect an item, press **CTRL** and click the item again.

14 Click **Save**.

The *Document Library* screen appears and displays the Web link and the Quick Links section of the home page displays the link.

Modifying Quick Links

After you add a Web link to the Quick Links section of the BTRS home page, you can modify the link's profile, or post an updated version of the link's associated document.

▸ **To update a quick link**

The following steps assume you have navigated to **Document Library | Portal Content | Quick Links.**

1 In the **Quick Links** folder, locate the link for which you want to update the profile.

2 Under the name of the link, click **Show Actions**.

The *Document Inspection* screen appears.

3 Under Actions, click **Edit Profile**.

The *Document Profile* screen appears.

4 Modify the link's profile as necessary.

5 Click **Save**.

The *Document Inspection* screen appears and displays the updated information.

▸ **To post an updated document**

Documents posted as quick links do not open when you click the link. Instead, a browser window opens to the URL you enter in the **Link** field.

1 In the **Quick Links** folder, locate the document for which you want to update the profile.

2 Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.

3 Under Actions, click **Update File**.

The *Update a document* screen appears.

4 Next to the **Document file name** field, click **Browse**.

BTRS opens the *Choose file* dialog box.

5 Navigate to and select the updated link file.

6 Click **Open**.

BTRS closes the *Choose file* dialog box, and displays the document path in the Document file name field.

7 Click **Continue**.

The *Document Profile* screen appears.

8 Update the document profile as necessary.

9   Click **Save**.

The *Document Inspection* screen displays the updated information.

Deleting Quick Links

When you no longer need to display a link in the Quick Links section on the BTRS home page, you can delete it from the Document Library.

You must remove the link and its associated document from the **Quick Links** folder to remove it from the Quick Links section of the home page.

▶ **To delete a quick link**

The following steps assume you have navigated to **Document Library | Portal Content | Quick Links.**

1   In the **Quick Links** folder, locate the link you want to delete.

2   Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.

3   Under Actions, click **Delete**.

BTRS displays the message, "Are you sure you want to delete this document?"

4   Click **OK**.

BTRS deletes the link from the Document Library. The link no longer appears on the BTRS home page.

Managing Categories

In addition to folders in the Document Library, categories provide an easy method for organizing documents, so that users can quickly locate and access documents posted on your portal. When users post documents on the portal, they can select from the list of categories you create to assign to documents. Categories appear on the BTRS home page in alphabetical order.

All users assigned BTRS Admin licenses have the ability to create, edit, and delete categories.

The Document Totals Log details the number of documents assigned to each category. For more information, see "Document Totals Log" in Chapter 7, page 101.

As you manage your Document Library, you may also want to update the categories that appear as well. BTRS enables you to modify category names, or delete those that are outdated or that are no longer used.

Adding Categories

Categories and subcategories provide an additional method for users to locate documents by topic, responsible group, or any other sorting process that enables users to efficiently access documents stored in the library. You can add categories to the BTRS portal so that users can organize documents that are posted.

The following table provides an overview of where categories and subcategories appear in the BTRS portal:

Where to look	Category	Subcategory
Categories section on the BTRS home page	X	
Categories section of the BTRS portal (dashboard)	X	X
In the **Categories** list on the *Document Profile* screen (when you check in or publish base documents and web links)	X	X

▶ **To add a category**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

2   Under Manage Portal Content and Settings, click **Manage Categories**.

    The *Manage Categories* screen appears.

3   In the field next to the **Create New** button, type the name of the category you want to create.

4   Click **Create New**.

    The *Manage Categories* screen appears and displays the new subcategory. The category also appears on the BTRS home page and in the Categories section.

▶ **To create a subcategory**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

2   Under Manage Portal Content and Settings, click **Manage Categories**.

    The *Manage Categories* screen appears.

3   Locate and click the name of the category to which you want to add a subcategory.

    The *Manage Categories* screen updates to reflect the category structure.

4   In the field next to the **Create New** button, type the name of the category you want to create.

5   Click **Create New**.

    The *Manage Categories* screen appears and displays the new subcategory. The category also appears in the Categories section, but not on the BTRS home page.

Modifying Categories

You can rename an existing category after you have created it, as well as add a description of the category, and the name of the person responsible for the category and that person's e-mail address. Renaming a category does not affect the documents in that category; the document profile is automatically updated to reflect the new category name.

▶ **To modify a category**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Portal Content and Settings, click **Manage Categories**.

The *Manage Categories* screen appears.

3   Next to the name of the category you want to edit, click ✎ .

4   In the **Category Name** field, make any changes to the name of the category.

5   In the **Category Description** field, type a brief description of the category's purpose.

This text appears under the category name on that category's *Categories* screen.

6   In the **Contact Name** field, type the name of the person responsible for managing this category.

The name of the contact appears under the category name on that category's *Categories* screen.

7   In the **Contact E-mail** field, type the responsible person's e-mail address.

When you add an e-mail address for the responsible person, the contact name that appears on the *Categories* screen becomes a link to send e-mail to the contact.

8   Click **Save**.

The *Manage Categories* screen appears.

Deleting Categories

When you no longer need to use a category to organize your documents, you can delete it. When a category is deleted, it no longer appears on the BTRS home page, in the Categories section, or in the **Categories** list on the *Document Profile* screen. Any subcategories created within the category are also deleted. In the Document Library section, the category is removed from the document profile for each document assigned to that category; the documents in the category are not deleted.

▶ **To delete a category**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

2   Under Manage Portal Content and Settings, click **Manage Categories**.

    The *Manage Categories* screen appears.

3   Next to the name of the category you want to delete, click ✕.

    BTRS diaplays the message, "Are you sure you want to delete this category?"

4   Click **OK**.

    The *Manage Categories* screen updates to reflect the deleted category.

Managing Alert Settings

In addition to determining which roles or role groups a role can alert, BTRS administrators can also set customized global alerting preferences for each alert sent. These global preferences include the number of times BTRS attempts to contact each user, the number of minutes between each attempt, and whether or not BTRS will continue to send alert messages to users if the alert should expire before all users are contacted.

Before you can change the default alert settings, you must have permission to manage alert settings. For information about assigning application rights, see "Assigning Application Rights to Roles" in Chapter 5, page 56.

▶ **To manage global alert settings**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

2   Under Manage Portal Content and Settings, click Manage Alert Settings.

    The *Manage Alert Settings* screen appears.

3   In the **Alert Expiration Action** list, select **Continue on Expiration** if you want alert calls to be made even if an alert expires.

    -or-

    Select **Stop on Expiration** if you want alert calls to stop when an alert expires, even if all calls have not yet been made.

4   In the **Min. Attempt Interval** feild enter the minimum number of minutes you want BTRS to wait between attempting calls to each user's selected locations.

5   In the **Attempt Number** field, enter the total number of attempts you want BTRS to make to each selected location.

6   Click **Save**.

BTRS displays the message, "Do you want to save the changes?"

7   Click **OK**.

BTRS saves the alert settings.

3 Managing Folders and Documents

Within the Document Library, users can create a folder directory and post documents based on the permissions they have been assigned. As an administrator, you can manage both of these elements to keep the portal working in an efficient and organized manner.

Managing Folders

The steps for creating folders are included in the *User Guide*.

Managing the folders within your Document Library can make adding and managing the documents in the library a much easier task. By assigning folder profiles, permissions, and approval routing, you can maintain control over who accesses each folder and the information within it.

You can generate the Folder Permission Report at any time to view the number of documents assigned to each folder in the Document Library. For more information, see "Folder Permission Report" in Chapter 7, page 104.

Working with Folder Profiles

Folder profiles can provide you with a method to categorize the documents within each folder. The default document type is a base document, but you can also add Web links, news, and/or announcements profiles as well.

Adding Document Profiles to Folders

If you have permission to do so, you can determine for each folder what types of document profiles can be assigned. If necessary, you can add one or more of these profile types to a folder so that users can assign them to documents.

▶ **To add document profiles to folders**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

2   Under Manage Portal Content and Settings, click **Manage Folders**.

    The *Manage Folders* screen appears.

3   In the **Choose a document folder** list, select the folder profile to which you want to add document types.

4 Select the **Set Folder Profiles** option.

5 Click **Next**.

The *Manage Folders* screen displays the available document types.

6 Under All Available Document Profiles, select one or more of the following:

Select this document type	If users will create
Base document	Standard documents in the document library (can be document file, such as .doc, .xls, .pdf, .ppt, .mbd, .htm, or .txt; or graphics file, such as .bmp, .gif, or .jpg)
Web link	Links to a page of a Web site
Announcement	Standard documents (see above), but without category or description options
News item	Standard documents (see above), but does without category or description options

7 Click **add>>**.

The document types display in the **Profiles assigned to this folder** list.

8 To change the default document type for this folder, in the **Default Profile** list, select any one of the types you are including in the folder.

9 Click **Submit**.

BTRS displays the message, "Document profiles successfully updated!"

Modifying Document Profiles in Folders

If you want to change for a folder what types of document profiles can be assigned, you can do so if you have permission to manage that folder. The default document type is a base document, but you can also add Web links, news, and/or announcements profiles as well.

▶ **To modify folder document profiles**

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2 Under Manage Portal Content and Settings, click **Manage Folders**.

The *Manage Folders* screen appears.

3 In the **Choose a document folder** list, select the folder profile to which you want to add document types.

4   Select the **Set Folder Profiles** option.

5   Click **Next**.

The *Manage Folders* screen displays the available document types.

6   Under All Available Document Profiles, select one or more of the following:

Select this document type	If users will create
Base document	Standard documents in the document library (can be document file, such as .doc, .xls, .pdf, .ppt, .mbd, .htm, or .txt; or graphics file, such as .bmp, .gif, or .jpg)
Web link	Links to a page of a Web site
Announcement	Standard documents (see above), but without category or description options
News item	Standard documents (see above), but without category or description options

7   Click **add>>**.

The document types display in the **Profiles assigned to this folder** list.

– or –

To remove a document type from this folder, click **remove**.

8   To change the default document type for this folder, in the **Default Profile** list, select any one of the types you are including in the folder.

9   Click **Submit**.

BTRS displays the message, "Document profiles successfully updated!"

Working with Folder Permissions

For each folder in the Document Library that you have permission to manage, you can select which roles may view, author, and/or administer documents and subfolders within that folder.

By default, each existing folder has the following permissions established:

This user license	Has this set of permissions
Alerting Level	None (cannot view)
BTRS Collaboration	Author

This user license	Has this set of permissions
BTRS Admin	Admin

In addition, each folder you create in the Document Library automatically assumes the permissions of its parent folder. Consequently, if you do not set any of your own folder permissions, each folder you create in the Document Library will inherit the default permissions as described in the previous table.

For more information about the types of permissions you can assign and how each functions, see the *User Guide*.

Setting Folder Permissions

With the exception of the Document Library's three default folders (Portal Content, Documents, and Dashboard), you can establish folder permissions if you have the ability to manage that folder. You can create customized folder permissions for each folder, or apply the same permissions to a folder and all of its subfolders.

Before you can save your settings, you must assign at least one of the following as an Admin for the folder:

- Any role you are a member of

- Any role group you are a member of

- The BTRS Admin license

▸ **To set folder permissions for a folder**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Content and Settings, click **Manage Folders**.

The *Manage Folders* screen appears.

3   In the folder list, select the folder for which you want to set permissions.

4   Select the **Set Folder Permissions** option.

5   Click **Next**.

The *Manage Folders* screen displays the current permissions established for the folder.

6   For each level of permissions, click **Add** to select the role, role group, and/or license you want to assign the corresponding level of access.

7   For each level of permissions, click **Remove** to select the role, role group, and/or license you do not want to assign the corresponding level of access.

8   To apply this permission set up to all existing subfolders, select the **Apply to all subfolders** check box.

The permission scheme for this folder will automatically be inherited by any new subfolder created.

9   Click **Submit**.

BTRS displays the message, "Permissions for [folder path/folder name] successfully updated!"

Modifying Folder Permissions

With the exception of the Document Library's three default folders (Portal Content, Documents, and Dashboard), you can establish folder permissions if you have the ability to manage that folder. You can create customized folder permissions for each folder, or apply the same permissions to a folder and all of its subfolders.

Before you can save your settings, you must assign at least one of the following as an Admin for the folder:

• Any role you are a member of

• Any role group you are a member of

• The BTRS Admin license

▶ **To modify folder permissions for a folder**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Content and Settings, click **Manage Folders**.

The *Manage Folders* screen appears.

3   In the folder list, select the folder for which you want to modify permissions.

4   Select the **Set Folder Permissions** option.

5   Click **Next**.

The *Manage Folders* screen displays the current permissions established for the folder.

6   For each level of permissions, click **Add** to select the role, role group, and/or license you want to assign the corresponding level of access.

7   For each level of permissions, click **Remove** to select the role, role group, and/or license you do not want to assign the corresponding level of access.

8   To apply the new permission set up to all existing subfolders, select the **Apply to all subfolders** check box.

The approval routing scheme for this folder will automatically be inherited by any new subfolder created.

9   Click **Submit**.

BTRS displays the message, "Permissions for [folder path/folder name] successfully updated!"

Working with Folder Approval Routing

If you want each document posted to a folder to be reviewed and approved before it is published, you can select which users must give their approval first. You can choose to have one, all, or a sequence of reviewers approve the document. If any approver rejects the document, the document is automatically checked in to the Document Library so that the author can make changes.

Setting Folder Approval Routing

In addition to levels of permission assigned to each folder in the Document Library, if you have permission to manage a folder, you can establish and update approval routing for that folder.

▶ **To set folder approval routing**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Content and Settings, click **Manage Folders**.

The *Manage Folders* screen appears.

3   In the folder list, select the folder for which you want to set approval routing.

4   Select the **Set Folder Approval Routing** option.

5   Click **Next**.

The *Manage Folders* screen displays approver selection information.

6   Under the **Approvers** list, click **ADD USERS**.

BTRS opens the *Select Users* window.

7   Perform one or more of the following functions:

On this tab	Do this
Tree	In the **Organizational Unit** list, click the name of each user you want to add
Search	In the **Find User** field, type all or part of the person's name, and click **go** In the results list, click the name of each user you want to add
List	In the alphabetical list, click the name of each user you want to add

8   When you are done, click **OK**.

BTRS closes the *Select Users* window, and displays the name of each user selected in the **Approvers** list.

9   Select one of the following options:

Select this option	To set up this routing structure
No approval required (default)	No user needs to approve documents before they are published (default)
Everyone must approve (parallel)	All persons selected must approve the document, in any order
Only one approval needed	Any one of the selected persons must approve the document
All must approve in assigned order (serial)	All persons selected must approve the document, in the order they appear in the **Approvers** list As the document is approved, only one approver at a time will see the document in the **Awaiting Your Approval** list on the home page

10   To apply the same approval routing to all existing subfolders, select the **Apply to all subfolders** check box.

11   Click **Submit**.

BTRS displays the message, "Approval routing for [folder path/folder name] successfully updated!"

Modifying Folder Approval Routing

In addition to levels of permission assigned to each folder in the Document Library, if you have permission to manage a folder, you can establish and update approval routing for that folder.

▶ **To set folder approval routing**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Content and Settings, click **Manage Folders**.

The *Manage Folders* screen appears.

3   In the folder list, select the folder for which you want to modify approval routing.

4   Select the **Set Folder Approval Routing** option.

5   Click **Next**.

The *Manage Folders* screen displays the current approver structure.

6   Under the **Approvers** list, click either **ADD USERS** or **REMOVE USERS**.

BTRS opens the *Select Users* window.

– or –

If you do not need to change the users in the **Approval** list, skip to step 9.

7   Perform one or more of the following functions:

On this tab	Do this
Tree	In the **Organizational Unit** list, click the name of each user you want to add or remove
Search	In the **Find User** field, type all or part of the person's name, and click **go** In the results list, click the name of each user you want to add or remove
List	In the alphabetical list, click the name of each user you want to add or remove

To view information user profile information, on the **Tree** and **Search** tabs, right-click the name of the user, and click **View User Properties**.

8   When you are done, click **OK**.

BTRS closes the *Select Users* window, and displays the name of each user selected in the **Approvers** list.

9   Select one of the following options:

Select this option	To set up this routing structure
No approval required (default)	No user needs to approve documents before they are published (default)
Everyone must approve (parallel)	All persons selected must approve the document, in any order
Only one approval needed	Any one of the selected persons must approve the document

Select this option	To set up this routing structure
All must approve in assigned order (serial)	All persons selected must approve the document, in the order they appear in the **Approvers** list As the document is approved, only one approver at a time will see the document in the **Awaiting Your Approval** list on the home page

10 To apply the same approval routing to all existing subfolders, select the **Apply to all subfolders** check box.

11 Click **Submit**.

BTRS displays the message, "Approval routing for [folder path/folder name] successfully updated!"

Managing Documents

The steps for adding documents to the portal are included in the *User Guide*.

In addition to working with folders to maintain order within your document library, you can manage down to the document level to further streamline productivity and efficiency in the Document Library section of the BTRS portal. You can keep document discussions up to date, manage approval routing and documents that have been checked out, generate reports on various aspects of the library, and create and delete subscriptions for users.

Managing Document Discussions

The steps for adding and modifying discussions in documents are included in the *User Guide*.

As users collaborate on documents posted on the BTRS portal, users can create discussion threads for each document. These discussions are stored separately from the document, so you can manage them without reviewing each document in the library.

If have a BTRS Admin license, you can delete obsolete or unnecessary discussions from documents in the library. In addition, if a document containing discussion threads is deleted from the Document Library before the discussions are deleted, you can delete the discussions so they no longer appear in the workspace.

Users can delete their own discussions from the document; however, only BTRS administrators can delete discussions in the BTRS Admin section of the portal.

▶ **To delete document discussions**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Content and Settings, click **Manage Discussions**.

The *Manage Discussions* screen appears.

3   Under Documents in this workspace, locate and select the discussion you want to delete.

Discussions are listed using the folder path and name of the document in which they reside.

4   Click **Delete discussions on selected documents**.

All discussions in the document are deleted.

The **Documents not in any workspace** section represents a Microsoft® SharePoint®-only functionality and does not actively list documents in the BTRS portal.

Managing Checked Out Documents

If a document has been checked out from the Document Library but needs to be made available to other users, and the person who checked out the document is not available to check in or publish the document, you can check the document back in if you have administrator permissions for that folder.

When you undo check out for a document, BTRS reverts to the last version of the document published or checked in to the Document Library. Any changes made to the document after check out do not appear.

▶ **To undo a checked out document**

You can also access the *Document Inspection* screen for checked out documents through the Documents Checked Out Log. For more information, see "Documents Checked Out Log" in Chapter 7, page 96.

1   On the BTRS navigation bar, click **Document Library**.

The *Document Library* screen appears.

2   Navigate to and locate the document you want to check back in.

3   Under the name of the document, click **Show Actions**.

The *Document Inspection* screen appears.

4   In the right pane, under Information, verify that the document is currently checked out.

5   Under Actions, click **Undo Check Out**.

BTRS displays the message, "Are you sure that you want to undo your check out of this document? You will lose all of the changes that you have saved on the server."

This option does not appear if you do not have permission to check the document in.

6   Click **OK**.

The *Document Inspection* screen updates to reflect the last version of the document in the library.

Managing Document Approval Routing

If necessary, you can override the approval routing assigned to an individual document within a folder so that the document can be published. If, for example, a particular reviewer is on vacation or will be unavailable for an extended period of time, you can remove the document's approval routing if the document only needs to be reviewed and approved by that person. You have the option to either remove approval routing so that the document can be published, or you can cancel the publishing process so that the document reverts to a checked in status.

You can manage approval routing on a document-by-document basis. Overriding approval or canceling publishing for a particular document only affects that document, and not the remaining documents in the folder.

▶   **To manage document approval routing**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Reports and Logs, click **Documents Awaiting Approval Log**.

The *Documents Awaiting Approval* screen appears.

3   In the Actions column for the document you want to approve and publish, click **Override Approval**.

BTRS displays the message, "Are you sure you want to override approval of this document? The document will be published live to the portal"

– or –

To stop the document's approval routing and publishing process altogether, click **Cancel Publishing**.

BTRS displays the message, "Are you sure you want to cancel publishing of this document? The document will revert back to a checked in state."

4   Click **OK**.

Your selected request is processed. A message corresponding to your selection displays.

Generating Document Reports

For more information about generating these reports and logs and what information is included in each, see Chapter 7, "Generating Reports and Logs," on page 87.

If you have permission to manage a folder, you can generate document logs and reports for each folder in the Document Library.

You can create the following logs and reports:

This log/report	Provides this information
Fax History Log	Which documents have been faxed to each role (or all roles), sorted by date/time sent or document title
Folder Permission Report	Roles and licenses assigned to each folder permission
Documents Checked Out Log	List by document title of each document checked out, its location, who checked it out, and when
Documents Awaiting Approval Log	List by document of each document currently needing approval from one or more approvers (each approver remaining is listed)
Document History Report	Lists document version history in order document was published to the portal
Document Totals Log	View number of documents within each folder, category, and/or last published by a specific user
Modified Content Report	List of each document that has been checked out/in, its location, the user who modified it, and when

Managing User Subscriptions

If you need to and if you have permission to manage other user's subscriptions, you can create and assign subscriptions to specific roles and role groups. You can also delete subscriptions for individual users.

Viewing a User's Subscriptions

If you need to, you can search for and view the subscriptions a user has created or been assigned. To search for a user abd see the results of the search, you must be able to manage that user's OU, role, or role group.

▶ **To view a user's subscriptions**

1   On the BTRS navigation bar, click **BTRS Admin**.

2   Under Mange Portal Content and Settings, click **Manage Subscriptions**.

   The *Manage Subscriptions* screen appears.

3   Under View User Subscriptions, in the field, type the username of the individual.

   You do not need to type the domain name, only the username. For example, type: jsmith or frankmadden

4   Click **Go**.

   The *Subscriptions* screen appears and displays the user's existing subscriptions.

Creating Role-based Subscriptions

You can create subscriptions to documents or folders within the Document Library, for one or more roles and/or role groups, through the *Manage Subscriptions* screen. When you create a subscription, notifications are posted on the BTRS home page, and each user in the role/role group automatically is notified via e-mail as often as you choose.

▶ **To create a subscription for a role or role group**

1   On the BTRS navigation bar, click **BTRS Admin**.

2   Under Mange Portal Content and Settings, click **Manage Subscriptions**.

   The *Manage Subscriptions* screen appears.

3   Under Assign Subscriptions, in the **Choose a document folder** list, select the folder for which you want to create a subscription.

   – or –

   If you are creating a subscription for an individual document, select the folder in which the document is stored.

4   Click **Next**.

The *Assigning Subscriptions* form appears.

5   Under the **Roles to assign this subscription to** list, click **ADD ROLES**.

BTRS opens the *Universal Selector* window.

6   Select the role(s) and/or role group(s) you want to include in this subscription.

7   When you are done, click **OK**.

BTRS closes the *Universal Selector* window and displays the roles and role groups you select in the **Roles to assign this subscription to** list.

8   In the **Subscription Title** field, type a name for this subscription.

9   In the **Choose a document to assign subscriptions for** list, select the name of the document for which you want to create a subscription.

If the document you want is not listed in the current folder, at the top of the form under **current folder**, you can select another folder by clicking **change**.

– or –

If you want to create a subscription to the entire folder, select the **Check here to subscribe to entire folder** check box.

10   In the **How Often** list, select the how frequently you want the users in the roles/role groups you've selected to receive e-mail notifications: **When a change occurs**, **Once a day**, or **Once a week**.

11   Click **Submit**.

BTRS creates the subscriptions and displays the subscription details. BTRS shows a list of all users, along with the status of the subscription at the bottom of the screen.

Deleting Subscriptions for Users

If necessary, you can delete a user's subscriptions, either individually or all at once.

▶ **To delete a subscription**

1   On the BTRS navigation bar, click **BTRS Admin**.

2   Under Mange Portal Content and Settings, click **Manage Subscriptions**.

The *Manage Subscriptions* screen appears.

3   Under View User Subscriptions, in the field, type the username of the individual.

You do not need to type the domain name, only the username. For example, type: `jsmith` or `frankmadden`

4   Click **Go**.

The *Subscriptions* screen appears and displays the user's existing subscriptions.

5   Locate the specific subscription you want to delete, and click **Delete subscription**.

BTRS displays the message, "Are you sure you want to delete this subscription?"

– or –

To delete all of the user's subscriptions, click **Delete all subscriptions**.

BTRS displays the message, "Are you sure you want to delete all subscriptions?"

6   Click **OK**.

BTRS deletes the subscriptions.

4 Setting Up Your Directories

The BTRS system uses a combination of permissions to create a secure environment within the portal. These permissions are assigned through different types of user licenses, application rights, and Document Library permissions, which may vary from user to user.

This chapter is designed to help to become familiar with the organizational terms used in BTRS' directories, and to assist you in planning the steps of creating the role and user structures for your portal.

Making Sense of OUs, Roles, Role Groups, and Users

Within the BTRS directory trees, BTRS Administrators can create a network of users, roles, and role groups, based on how they use the BTRS portal, what functions each performs, and where each works. Setting up your User and Role Directories is a very important part of making sure that users can access the information they need, and so that your system operates smoothly.

To better understand how BTRS works and before you begin creating user data, take a moment to review the different elements of the directories in the BTRS Admin section, to become familiar with what each does and how each of these elements work together.

What Is a User?

A user represents one person who uses the BTRS portal. While each user may belong to more than one role or role group, the information in a user profile reflects that of one person.

Users appear in the User Directory in the BTRS Admin section. As users are the smallest unit in the user directory, they do not contain sub-elements. For more information about working with users, see "Working with Users" in Chapter 6, page 77.

Sample User Directory tree (user profile details displayed)

What Is an OU?

An Organizational Unit (OU) represents one or more users within your BTRS network. In addition, users can be assigned to roles within an organizational unit. OUs might represent an agency, jurisdiction, town, county, department, division, or geographical region; each OU can include many roles and users who perform several functions within the framework.

OUs appear in the User and Role Directories in the BTRS Admin section. OUs may contain other OUs, roles, and/or users.

For more information about working with role OUs, see "Creating Role Directory Structures" on page 43. For more information about working with user OUs, see "Creating User Directory Structures" on page 44.
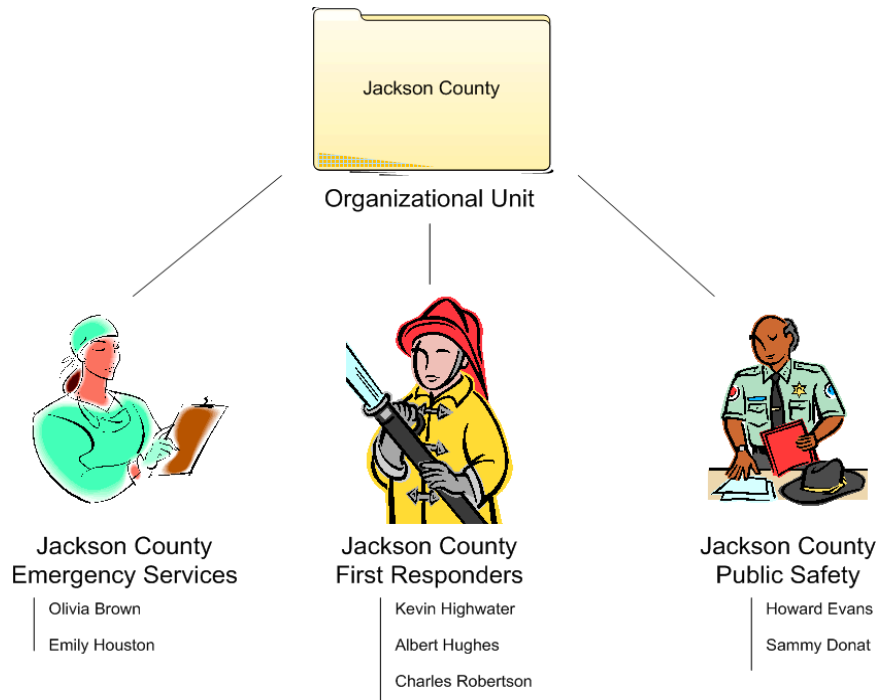
Sample Organizational Unit Structure

What Is a Role?

Within an OU or a role group, a role represents one or more people (users) who perform that function indicated by that role. For example, the Jackson County First Responders role in the previous illustration shows that Kevin Highwater, Albert Hughes, and Charles Robertson all work in the First Responder capacity in Jackson County.

Just as more than one user can be assigned to a single role, each user can perform more than one role. For example, Kevin Highwater serves as a First Responder in Jackson County, but he also works in Milltown as part of the town's First Responder unit. He is assigned two roles: Jackson County First Responder, and Milltown First Responder.

Roles appear in the Role Directory in the BTRS Admin section. Roles can contain one or more users. For more information aboout working with roles, see "Working with Roles" in Chapter 5, page 52.

Sample Role Directory tree displaying role profile details

What Is a Role Group?

Like OUs, role groups provide you with a method to organize role groups. However, role groups generally are assigned to a collection of roles by location, or by function. A role group can include several roles, and hence, all the users assigned to those roles.

For more information about working with role groups, see "Working with Role Groups" in Chapter 5, page 67.
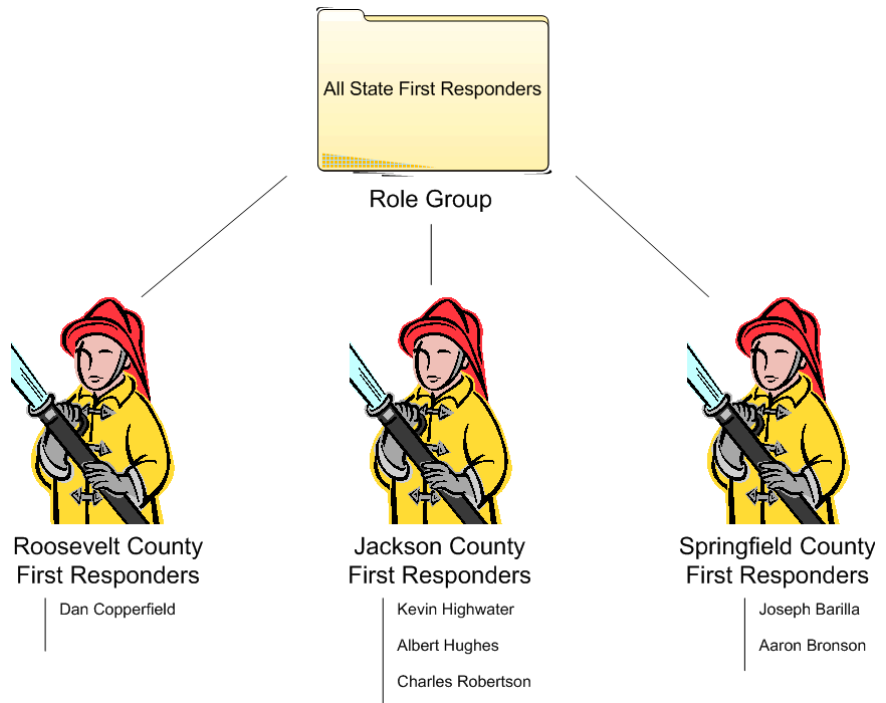
Sample Role Group Structure

Role groups appear in the Role Group Directory in the BTRS Admin section. Role groups may contain one or more roles.

Sample Role Groups Directory tree (role group profile details displayed)

Planning Your Directory Setup

Setting up your directories can be a daunting task if you have many users and functions to include in your structure. Before you begin the process of creating each user account, use the following examples as a tool to help you determine what might be the best approach.

Determining the Order to Create Directory Data

Because BTRS is so flexible, you can create data in just about any order you like, as you can assign permissions at the user or role level. However, selecting an order to enter your data can streamline the process and eliminate extra time organizing, such as moving existing users and roles into newly-created Organizational Units.

The following provide just a few examples of the order in which you might create data. Each method enables you to easily assign role permissions to each user as you create individual accounts, or you can choose instead to assign users to roles through the Role Directory after you have created user accounts.

▸ **Example 1**

1   Organizational Units in Role Directory

2   Roles in Role Directory

3   Organizational Units in User Directory

4   Users in User Directory

    Assign roles to users

5   Role groups in Role Group Directory

    Assign roles to role groups

▸ **Example 2**

1   Role groups in Role Group Directory

2   Organizational Units in Role Directory

3   Roles in Role Directory

    Assign roles to role groups

4   Organizational Units in User Directory

5   Users in User Directory

    Assign users to roles

▸ **Example 3**

1   Organizational Units in Role Directory

2   Organizational Units in User Directory

3   Roles in Role Directory

4   Role groups in Role Group Directory

Assign roles to role groups

5   Users in User Directory

Assign users to roles

Creating Role Directory Structures

BTRS enables you to create directory structures that are as simple or complex as you need. Each OU may contain additional "sub-OUs," each of which contains roles, or just the roles themselves.

For example, you can create OUs in the Role Directory called "Adams County" and "Region 1 Hospitals." The Adams County OU might contain roles such as the "Adams County EMS Coordinator" and "Adams County Sheriff." The Region 1 Hospitals OU may contain additional sub-OUs, including "Farber Hospital" and "Mercy Hospital," and roles such as "Mercy Hospital Chief Medical Officer," and "Pulmonary Specialist." The following table displays this information by hierarchical level.

Organizational Unit (level 1)	*Adams County*	*Region 1 Hospitals*	
Organizational Unit (level 2)	None	Farber Hospital	Mercy Hospital
Roles	Adams County EMS Coordinator	Pulmonary Specialist	Mercy Hospital Chief Medical Officer
	Adams County Sheriff		

In the Role Directory tree, this organizational structure appears as follows:
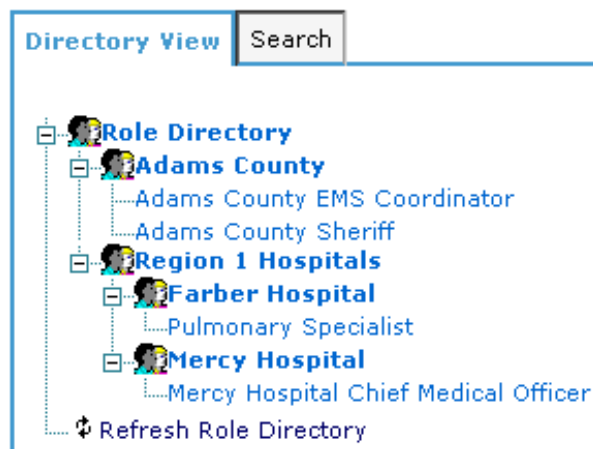
Creating User Directory Structures

For more information about working in the User Directory, see Chapter 6, "Working in the User Directory," on page 71.

You can work with Organizational Units (OUs) in the BTRS Admin section in two ways: through the Role Directory, and through the User Directory. While the processes setting up and maintaining OUs in either directory are quite similar, the OUs you set up, and their corresponding functionality and purpose, may be quite different.

In the User Directory, for example, you can create two OUs called "Adams County" and "Fortuna County." In Adams County, two users both work in the "Emergency Services" role. In Fortuna County, two users work in the "First Responders" role, and two work in the "Law Enforcement" role.

Organizational Unit (level 1)	*Adams County*	*Fortuna County*	
Organizational Unit (level 2)	Emergency Services	First Responders	Law Enforcement
Users	Agatha Parker	Lin Chieu	Taylor Rose
	LaShaun Prince	Robert Epson	Eve Ransom

This structure appears as follows in the User Directory:
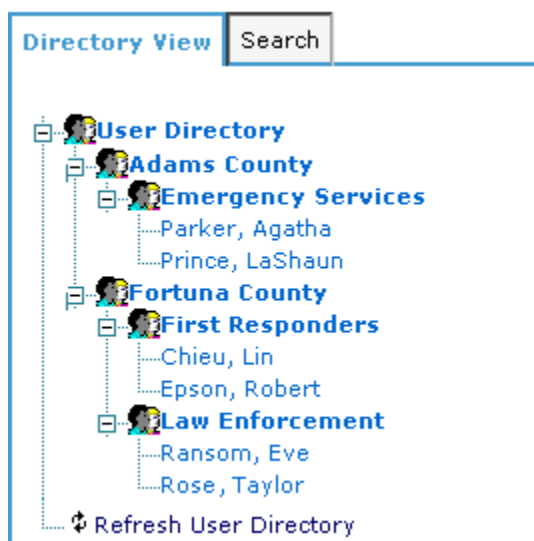
5 Working in the Role Directory

Roles function in BTRS to represent one or more users who perform the same function. Because the person filling a role may change as time goes on, you can easily disassociate the user from the role without having to move or delete any information in your directory.

Within the Role Directory, roles are organized into role-based Organizational Units (OUs). In the Role Groups Directory, roles are grouped into role groups. Role OUs provide a method for organizing the roles within your organization, while role groups enable both BTRS Admins and end users to quickly select a single group to send alerts, or set up subscriptions or folder permissions.

Information presented in this chapter assumes that at least one of the roles to which you have been assigned can manage the user accounts, Organizational Units (OUs), roles, and role groups with whom you are working.

Working with Role OUs

You can work with Organizational Units (OUs) in the BTRS Admin section in two ways: through the User Directory, and through the Role Directory. In the Role Directory, roles are grouped into Organizational Units (OUs), which can be based on geographic area, teams, or other methods you choose. While the processes setting up and maintaining OUs in either directory are quite similar, the OUs you set up, and their corresponding functionality and purpose, may be quite different.

OUs in the Role Directory serve to help you organize all the functions that your users perform. When you set up OUs in the Role Directory, you can emulate your organization's structure for easy maintanence, and create roles within the OUs to represent the functions people in your organization execute.

Once you have created role OUs, you can rename or move the OU if you need to do so. In addition, if you want users in particular roles to be able to view and manage OUs in the Role Directory, you can assign those roles management rights for select OUs.

You cannot delete role OUs from the Role Directory. For more information or for help with this feature, please contact Virtual Alert.

Creating Role OUs

The first step in setting up your Role Directory is to create the role OUs that will serve as the organizational backbone of the directory.

▶ **To create an OU in the Role Directory**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2   Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* screen appears.

3   In the left pane, expand the directory tree.

4   Right-click the Role Directory OU, and click **Create New OU**.

If you are creating an OU that will reside within another OU, right-click the name of the parent OU.

In the right pane, the *Create New OU within Role Directory* form appears.

5   In the **New OU Name** field, type a name for the OU.

6   Click **Save**.

BTRS displays the message, "[name of OU] was successfully created."

7   Click **OK** to refresh the Role Directory tree.

Editing Role OU Profiles

After you create an OU, you can rename or move the OU to another location in the tree. When you move an OU to another location, all sub-OUs and the roles within them move as well.

You cannot delete role OUs from the Role Directory. If you need to delete an OU, please contact Virtual Alert.

Renaming Role OUs

Should you need to change the name of an OU, you can update the name of the OU without affecting any sub-OUs or roles contained within it.

▶ **To rename a role OU**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2   Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* screen appears.

3   In the left pane, expand the directory tree.

4   Right-click the name of the OU you want to rename, and click
    Rename OU.

    In the right pane, the *Rename OU [name of OU]* form appears.

5   In the **New OU Name** field, update the name of the OU.

6   Click **Save**.

    BTRS displays the message, "Are you sure you want to rename [old
    OU name] to [new OU name]?"

7   Click **OK**.

    BTRS dislays the message, "[old OU name] successfully renamed to
    [new OU name]."

8   Click **OK** to refresh the Role Directory tree.

Moving Role OUs

You can also move a single
role to another location in the
directory. For more information,
see "Moving Roles to Different
OUs" on page 48.

Should you need to, you can move an entire OU (and all of its contents) to
another location in the directory.

▶   **To move a role OU**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

You can also access BTRS
Admin menu functions from the
BTRS Admin submenu.

2   Under Manage Groups and Users, click **Manage Roles**.

    The *Manage Roles* screen appears.

3   In the left pane, expand the directory tree.

4   Right-click the name of the OU you want to move, and click **Move
    OU**.

    In the right pane, the *Move OU [name of OU]* form appears.

5   Next to the Currently Selected OU field, click **SELECT OU**.

    BTRS opens the *Select Role OUs* window.

6   Double-click the name of the OU that will serve as the new parent
    OU.

To move the OU to the highest level in the directory, select the Role Directory
OU.

7   Click **OK**.

    BTRS closes the *Select Role OU*s window, and displays the name of
    the OU in the **Currently Selected OU** field.

8   Click **Move**.

    BTRS displays the message, "Are you sure you want to move [name
    of OU] and all of its contents to [new location]?"

9   Click **OK**.

BTRS displays the message, "[name of OU] was successfully moved to [new location]."

10   Click **OK** to refresh the Role Directory tree.

Moving Roles to Different OUs

When you create a role, it becomes part of the Role Directory structure. If you create role OUs before setting up your roles, each role is automatically "assigned" to the OU within which it resides. If you decide to create roles first, you can then move the role under its appropriate OU at a later time. Organizing your roles within OUs can help tremendously with the maintenance of your directory, and for assigning management rights to OUs in the directory.

You can also move an entire OU (including all its roles) to another location in the directory. For more information, see "Moving Role OUs" on page 47.

▶   **To move a single role to a different OU**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* screen appears.

3   In the left pane, expand the directory tree.

4   Right-click the role you want to move, and click **Move Role**.

In the right pane, the *Move Role [name of role]* form appears.

5   Next to the Currently Selected OU field, click **SELECT OU**.

BTRS opens the *Select Role OUs* window.

6   On the **Tree** tab, locate and double-click the OU to which you move this role.

7   Click **OK**.

The name of the role appears in the **Currently Selected OU** field.

8   When you are done, click **Save**.

BTRS displays the message, "Are you sure you want to move [name of role]?"

9   Click **OK**.

BTRS displays the message, "[name of role] was successfully moved to [name of OU]."

▶ **To move multiple roles to another OU**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* screen appears.

3   In the left pane, expand the directory tree.

4   Right-click the OU that you want to move the roles to, and click **Move Roles to this OU**.

In the right pane, the *Move Roles to [name of OU]* form appears.

5   Under Selected Roles, click **ADD ROLES**.

BTRS opens the *Select Roles* window.

6   Select one or more roles you want to move to the new OU.

7   Click **OK**.

BTRS closes the *Select Roles* window, and displays the roles in the **Selected Roles** list.

8   Click **Move**.

BTRS displays the message, "Are you sure you want to move the selected Role(s) to [name of new OU]?"

Click **OK**.

A message displays, showing all roles assigned to the parent OU.

Assigning Managers to Role OUs

As you create roles and link users to those roles, you can designate one or more roles to manage role OUs in the directory. By default, roles are not given permission to view any other roles or OUs in the Role Directory. If the users in a particular role, however, need to view, change, or add roles, you can select specific OUs for that role to manage, which then become visible in the Role Directory.

For example, the BTRS Administrator can set up an OU called Adams County that contains several OUs and roles that appear as follows:
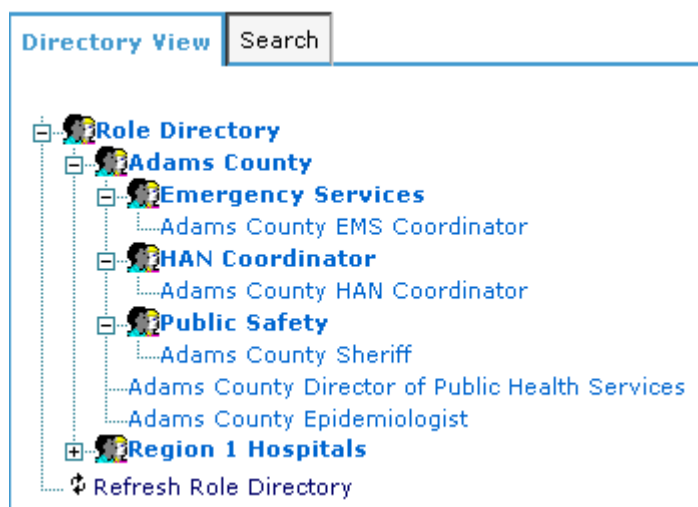
Role Directory view - Assigned to manage all available OUs and roles

In this structure, the BTRS Administrator is able to view all OUs and roles created in the Role Directory.

If the Adams County EMS Coordinator role, on the other hand, is given permission to manage only the Emergency Services OU, when the users in that role view the Role Directory, it appears as follows:
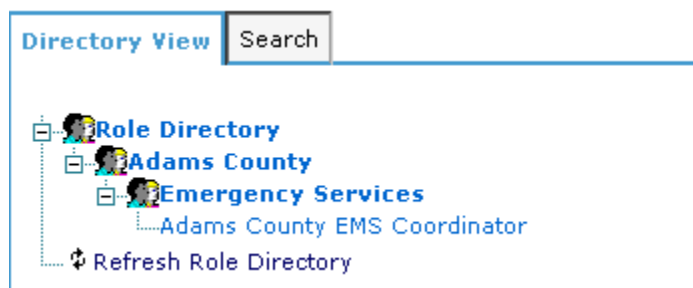
Role Directory view - Assigned to manage single OU only

You can assign managers to OUs in the Role Directory tree in two ways:

- Through the OU's profile - see "To assign OU managers by OU" on page 50

- By selecting the individual role(s) - see "To assign OU managers by role" on page 52

▶ **To assign OU managers by OU**

The steps in this process assume both the role OU and role that will manage it have been created. For more information about creating role OUs, see "Creating Role OUs" on page 46. For more information about creating roles, see "Creating Roles" on page 53.

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* screen appears.

3   In the left pane, expand the directory tree.

4   Locate the name of the OU to which you want to assign a managing role.

5   Right-click the OU, and click **Assign OU Manager**.

In the right pane, the *Assign Managers to [name of OU]* form appears.

6   Under Current Managers, click **ADD ROLES**.

BTRS opens the *Select Roles* window.

You may also search for the role on the **Search** tab, or select from an alphabetical listing on the **List** tab.

7   On the **Tree** tab, locate and double-click the role(s) you want to manage this OU.

8   Click **OK**.

In the right pane, the role appears in the **Current Managers** list.

9   When you are done, click **Save**.

BTRS displays the message, "The following roles have been assigned as managers of [name of OU]: [name of role]."

10   Click **OK** to refresh the Role Directory tree.

▶ **To assign OU managers by role**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* screen appears.

3   In the left pane, expand the directory tree.

4   Locate the name of the role that you want to assign to manage the OU.

5   Right-click the OU, and click **Edit Role**.

In the right pane, the *Edit Role [name of role]* form appears.

6   Click the **Management Rights** tab.

7   Under Role OUs this Role can manage, click **ADD ROLE OUS**.

BTRS opens the *Select Role OUs* window.

You may also search for the OU on the **Search** tab, or select from an alphabetical listing on the **List** tab.

8   On the **Tree** tab, locate and double-click the OU you want to this role to manage.

9   Click **OK**.

In the right pane, the Role OU appears in the **Role OUs this Role can manage** list.
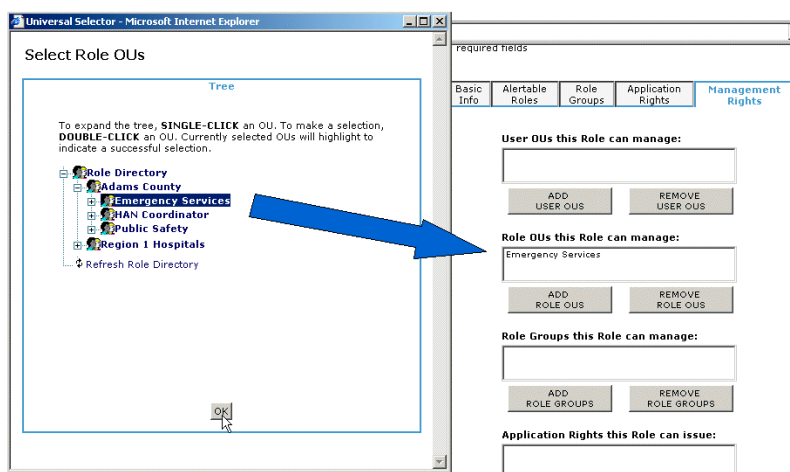
10   When you are done, click **Save**.

BTRS displays the message, "[name of role] successfully saved."

Working with Roles

Roles perform an integral function in BTRS, as many of the functions users can perform are based on roles and role groups. Setting up and maintaining the roles in the Role Directory is an important part of making sure BTRS users can effectively use the Document Library, access the user directories, and send and receive alerts.

BTRS enables you to create roles that contain permissions for alerting, and granting application and management rights. In addition, you can easily update which users are assigned to roles, and which role groups the role belongs to without having to move or delete objects you have already created.

You cannot delete roles from the Role Directory. For more information or for help with this feature, please contact Virtual Alert.

Creating Roles

When you create a role, in addition to assigning one or more users to the role, you can assign several types of permissions to the role profile. These permissions include the roles and role groups to which the new role is able to send alerts, the role group(s) to which the role is assigned, and administrative application and management rights.

The steps for creating a role are divided into sections according to each tab on the *Create New Role* form:

This tab	Includes this role profile information
Basic Info	• Name and description of the role • Users assigned to the role
Alertable Roles	• The roles and/or role groups to which the users in this role can send alerts
Role Groups	• The role group(s) to which this role is assigned
Application Rights	Enables users in the role do to one or more of the following: • Create role groups • Assign management rights to other roles • Publish content on the BTRS home page
Management Rights	Enables users in the role do manage one or more of the following: • User OUs • Role OUs • Role groups Also enables users in the role to do one or more of the following: • Grant application rights to other roles • Assign user licenses to other users

▸ **To access the *Create New Role* form**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* screen appears.

3   In the left pane, on the **Directory View** tab, expand the tree to locate the OU in which you want to create the role.

4   Right-click the name of the OU, and click **Create New Role**.

In the right pane, the *Create New Role Within [name of OU]* form appears.

5   Continue to the next section to add basic information about the role.

Assigning Users to Roles

One of the simplest yet most important elements of creating roles is naming the role so that users easily recognize it, and assigning the appropriate users to that role. Once assigned to a role, each user receives all permissions granted to that role.

▸   **To enter role information on the Basic Information tab**

The following steps assume that you have navigated to either the *Create New Role within [name of OU]* form or the *Edit Role [name of role]* form.

1   On the Basic Information tab, in the **Name** field, type the name of the role.

2   In the **Description** field, type a brief comment describing the purpose of the role.

3   Under Users Assigned to this Role, click **ADD USERS**.

BTRS opens the *Select Users* window.

You may also search for the user on the **Search** tab, or select from an alphabetical listing on the **List** tab.

4   On the **Tree** tab, expand the tree to locate the user(s) you want to assign to the role.

You may select as many users as perform the function defined by the role.

5   Click **OK**.

BTRS closes the *Select Users* window, and displays the user(s) you select in the **Users assigned to this Role** list.

To view information about a particular user you have selected, click the name of the user, then click **View User**.

6   Click **Save** to save the role without alerting or management capabilities.

– or –

Continue to the next section to add roles this role can alert.

Assigning Alertable Roles to Roles

By default, roles you create do not have permission to send alerts to any other role or role group (including the role itself). Before users in a role can effectively send alerts, you must select each role and/or role group this role will be able to choose from when sending an alert.

▶ **To enter role information on the Alertable Roles tab**

The following steps assume that you have navigated to either the *Create New Role within [name of OU]* form or the *Edit Role [name of role]* form.

1   On the Alertable Roles tab, under This Role Can Alert, click **ADD ROLES OR ROLE GROUPS**.

BTRS opens the *Universal Selector* window.
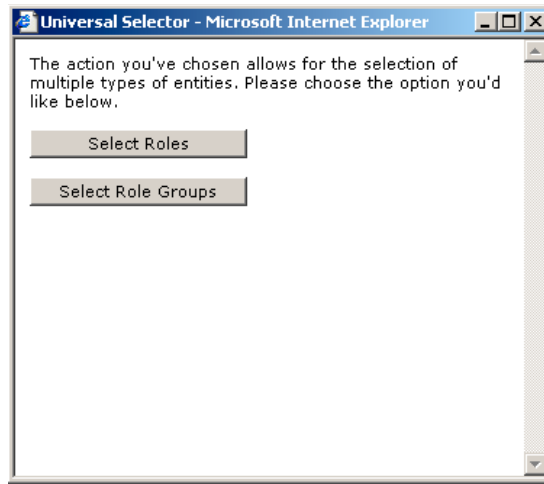
2   Click **Select Roles** to open the *Select Roles* window.

– or –

Click **Select Role Groups** to open the *Select Role Groups* window.

3   Select the role(s) or role group(s) you want this role to be able to alert.

4   Click **OK**.

BTRS closes the *Select Roles* or the *Select Role Groups* window and displays the names of the role(s) or role group(s) in the **This Role Can Alert** list.

5   Repeat step 1 through step 4 to add role(s) or role group(s).

6   Select the **This Role Can Alert Itself** check box if you want the users in this role to be able to send alerts to all the users in this role (including themselves).

7   Click **Save** to save the role without assigning additional alerting or management capabilities.

– or –

Continue to the next section to assign this role to one or more role groups.

Assigning Roles to Role Groups

Roles groups provide another method for BTRS Admins and end users to identify and work with roles. You can assign folder permissions in the Document Library, create subscriptions, and send alerts to role groups. For more information about role groups, see "Working with Role Groups" on page 67.

▶ **To enter information on the Role Groups tab**

The following steps assume that you have navigated to either the Create New Role within [name of OU] form or the Edit Role [name of role] form.

1   On the Role Groups tab, under Role Groups this Role is a member of, click **ADD ROLE GROUPS**.

BTRS opens the *Select Role Groups* window.

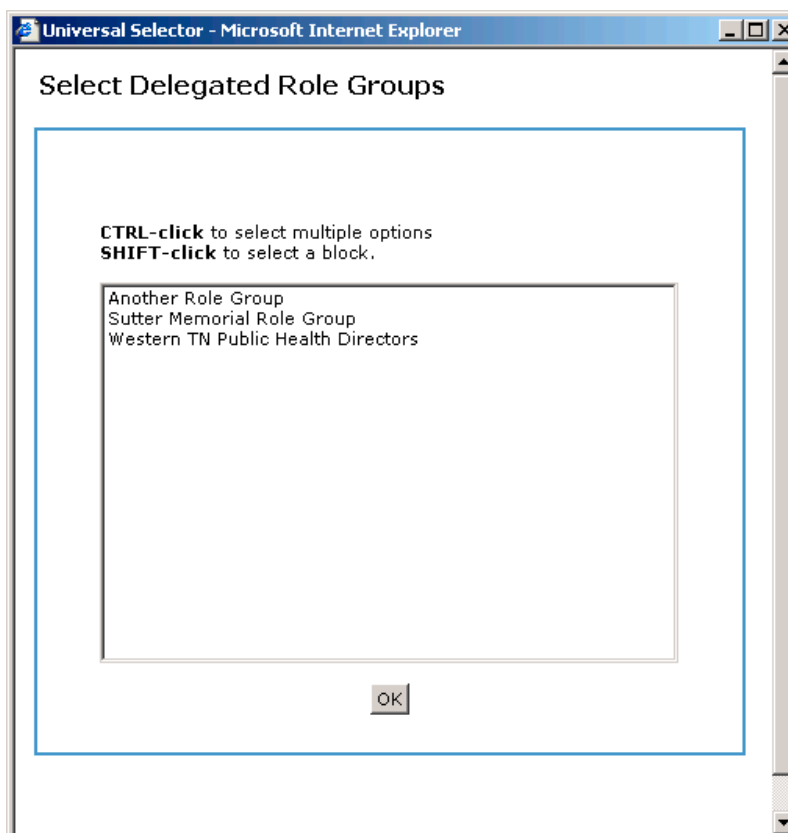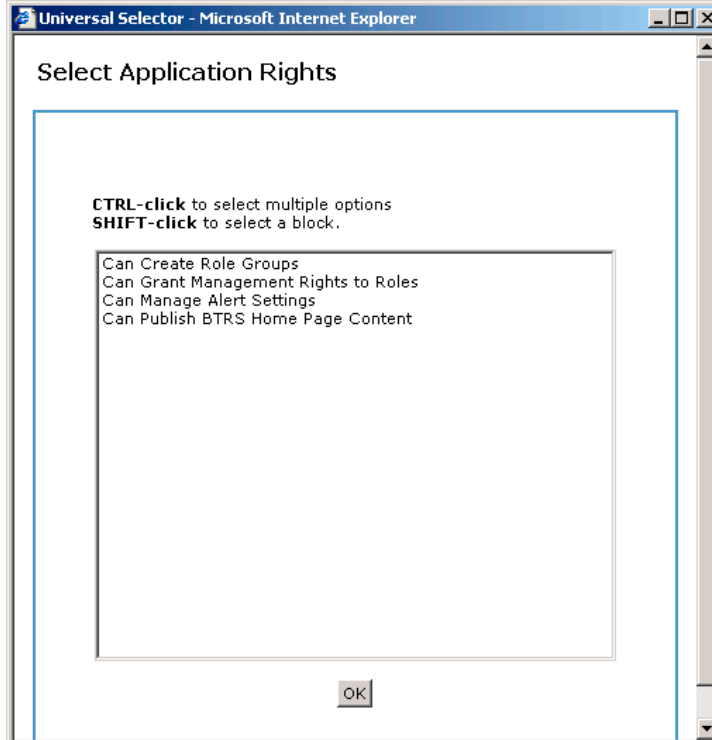2   Select one or more role groups you want this role to belong to.

3   Click **OK**.

BTRS closes the *Select Role Groups* window, and displays the name(s) of the role group(s) in the **Role Groups this Role is a member of** list.

4   Click **Save** to save the role without assigning additional management capabilities.

– or –

Continue to the next section to assign application rights to this role.

Assigning Application Rights to Roles

If users in a particular role need to create role groups, publish content to your BTRS home page, and/or grant management permissions to other roles, you can assign one or more application rights to that role.

▶ **To enter role information on the Application Rights tab**

The following steps assume that you have navigated to either the Create New Role within [name of OU] form or the Edit Role [name of role] form.

1   On the Application Rights tab, under Application Rights granted to this Role, click **ADD APPLICATION RIGHTS**.

BTRS opens the *Select Application Rights* window.

2   Select one or more of the following:
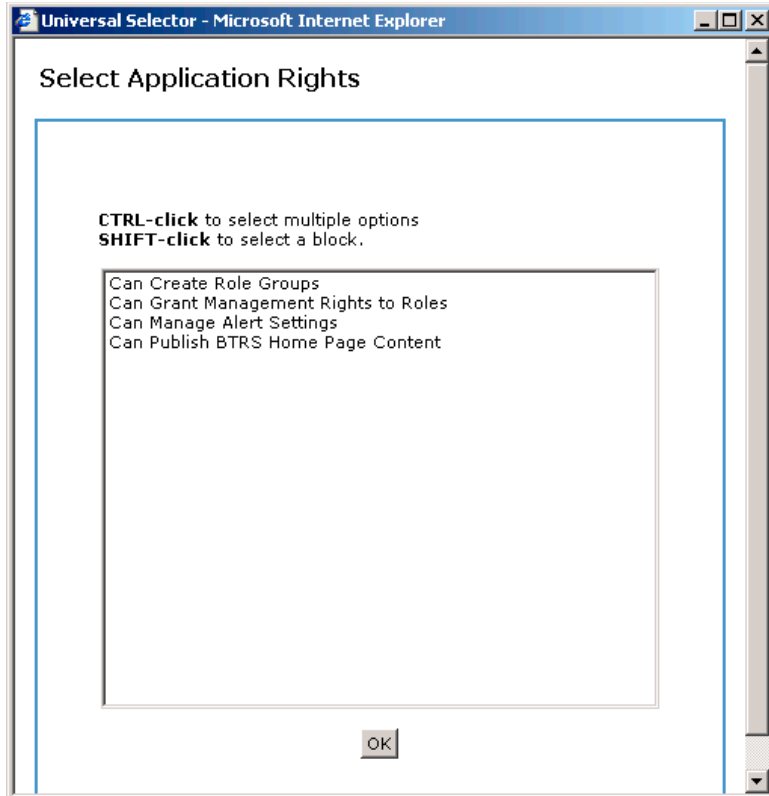
Each of the following options only appear if your role has permission to grant these management functions.

Select this option	To enable users in this role to do this
Can Create Role Groups	Create role groups in the Role Group Directory tree
Can Grant Management Rights to Roles	Assign management rights to other roles *This right only applies to those roles this role can manage (see next section for more information)*
Can Manage Alert Settings	Set and change default global alerting preferences
Can Publish BTRS Home Page Content	Post news and announcements, and add/remove quick links (that appear on the BTRS home page)

3   Click **OK**.

BTRS closes the *Select Application Rights* window, and displays the options in the **Application Rights granted to this Role** list.

4   Click **Save** to save the role without assigning additional management capabilities.

– or –

Continue to the next section to assign management rights to this role.

Assigning Management Rights to Roles

On the Management Rights tab, you can grant permissions to roles for a variety of functions to enable the users in a role to:

* Manage other:

    * User OUs

    * Role OUs

    * Role groups

* Grant one or more application rights to other roles

* Grant one or more management rights to other roles

▸ **To enter role information on the Management Rights tab**

The following steps assume that you have navigated to either the *Create New Role within [name of OU]* form or the *Edit Role [name of role]* form.

1   On the Management Rights tab, under User OUs this Role can manage, click **ADD USER OUS**.

BTRS opens the *Select User OUs* window.

2   Double-click one or more user OUs that you want this role to manage.

3   Click **OK**.

BTRS closes the *Select User OUs* window, and displays the OUs in the **User OUs this Role can manage** list.

4   Under Role OUs this Role can manage, click **ADD ROLE OUS**.

BTRS opens the *Select Role OUs* window.
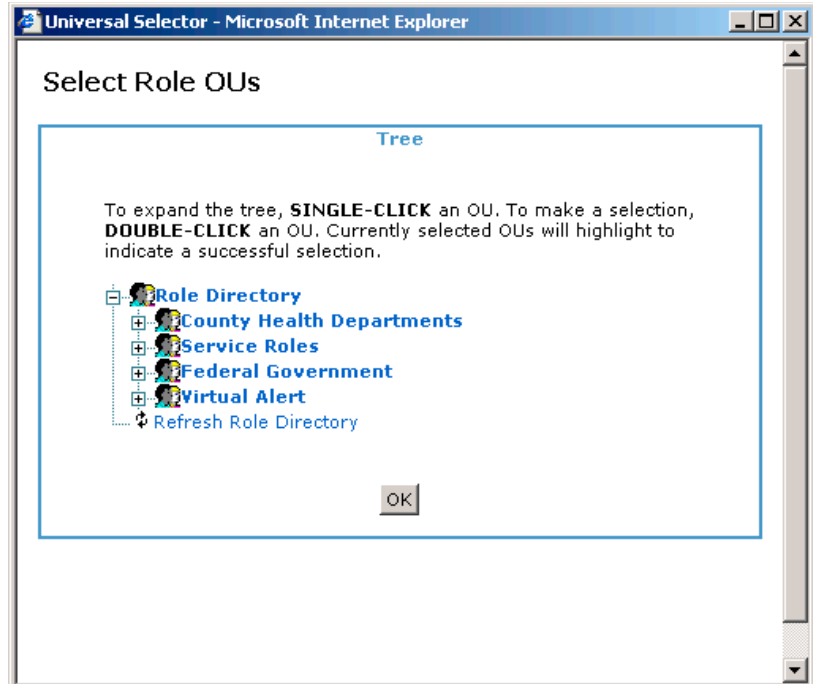
5   Double-click one or more role OUs that you want this role to manage.

6   Click **OK**.

   BTRS closes the *Select Role OUs* window, and displays the OUs in
   the **Role OUs this Role can manage** list.

7   Under Role Groups this Role can manage, click **ADD ROLE
   GROUPS**.

   BTRS opens the *Select Delegated Role Groups* window.

8   Select one or more role groups that you want this role to manage.

9   Click **OK**.

BTRS closes the *Select Delegated Role Groups* window, and displays the role groups in the **Role Groups this Role can manage** list.

10   Under Application Rights this Role can issue, click **ADD APPLICATION RIGHTS**.

BTRS opens the *Select Application Rights* window.

11 Select one or more of the following:

Select this option	To enable this role to grant other roles access to
Can Create Role Groups	Create role groups in the Role Group Directory tree
Can Grant Management Rights to Roles	Assign management rights to other roles
Can Publish BTRS Home Page Content	Post news and announcements, add/remove quick links, and add/ remove categories (that appear on the BTRS home page)

12 Click **OK**.

BTRS closes the *Select Application Rights* window, and displays the options in the **Application Rights this Role can issue** list.

13 Under Licenses this Role can issue, click **ADD LICENSES**.

BTRS opens the *Select Delegated Licenses* window.

14 Select one or more license levels you want this role to be able to assign to new users.

15   Click **OK**.

BTRS closes the *Select Delegated Licenses* window, and displays the options in the **Licenses this Role can issue** list.

16   Click **Save**.

BTRS displays the message, "[name of role] successfully saved."

17   Click **OK** to refresh the Role Directory tree.

Editing Role Profiles

After creating a role, you can change the name of the role, as well as add or remove users. You can also update the roles and role groups to which the role can send alerts. In addition, you can change the role groups the role is assigned to, and the application and management rights the role has.

You cannot delete roles from the Role Directory. If you need to delete a role, please contact Virtual Alert.

Renaming Roles

If you need to, you can change a role's name without affecting any of the users assigned to the role, or the role's profile information.

▸   **To rename a role**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* screen appears.

3   In the left pane, expand the directory tree.

4   Locate and right-click the role you want to rename, and click **Rename Role**.

The *Rename [name of role]* form appears.

5   In the **New Role Name** field, update the name of the role.

6   Click **Save**.

BTRS displays the message, "Are you sure you want to rename [old role name] to [new role name]?"

7   Click **OK**.

BTRS displays the message, "[old role name] was successfully renamed to [new role name]."

8   Click **OK** to update the Role Directory tree.

Updating Users Assigned to Roles

If you need to, you can add more users to or remove users from a role.

▶ **To update users assigned to roles**

1   On the *Manage Roles* screen, in the left pane, expand the directory tree.

2   Right-click the role you want to update, and click **Edit Role**.

In the right pane, the *Edit Role [name of role]* form appears.

3   On the Basic Info tab, under Users Assigned to this Role, do one or more of the following:

Click this	To do this
ADD USERS	Open the *Select Users* window and select one or users to add to the role
REMOVE USER	Remove the selected user(s) from the role
VIEW USER	View the user's profile details

4   When you are done, click **Save**.

BTRS displays the message, "[name of role] successfully saved."

Updating Alertable Roles

If you need to, you can update which roles and/or role groups a particular role can send alerts to.

▶ **To update a role's alertable roles**

1   On the *Manage Roles* screen, in the left pane, expand the directory tree.

2   Right-click the role you want to update, and click **Edit Role**.

In the right pane, the *Edit Role [name of role]* form appears.

3   Click the **Alertable Roles** tab.

4   Under This Role Can Alert, do one or more of the following:

Click this	To do this
ADD ROLES OR ROLE GROUPS	Open the *Select Roles* or *Select Role Groups* window and select one or more roles or role groups that this role can alert
REMOVE ROLES OR ROLE GROUPS	Remove the selected role(s) and/or role group(s) from the list that this role can alert

Click this	To do this
VIEW ROLE OR ROLE GROUP	View the role's or role group's profile details

5   When you are done, click **Save**.

BTRS displays the message, "[name of role] successfully saved."

Updating Roles Assigned to Role Groups

If necessary, you can update the role groups to which a role is assigned.

▸ **To update the role groups this role is assigned to**

The following steps assume that you have navigated to the Manage Roles screen.

1   On the *Manage Roles* screen, in the left pane, expand the directory tree.

2   Right-click the role you want to update, and click **Edit Role**.

In the right pane, the *Edit Role [name of role]* form appears.

3   Click the **Role Groups** tab.

4   Under Role Groups this Role is a member of, do one or more of the following:

Click this	To do this
ADD ROLE GROUPS	Open the *Select Role Groups* window and select one or more role groups to add this role to
REMOVE ROLE GROUPS	Remove this role from the selected role group(s)
VIEW ROLE GROUP	View the role group's profile details

5   When you are done, click **Save**.

BTRS displays the message, "[name of role] successfully saved."

Updating Application Rights Assigned to Roles

Should you need to, you can change which application rights are granted to a particular role.

▸ **To update a role's assigned application rights**

The following steps assume that you have navigated to the Manage Roles screen.

1   On the *Manage Roles* screen, in the left pane, expand the directory tree.

2   Right-click the role you want to update, and click **Edit Role**.

In the right pane, the *Edit Role [name of role]* form appears.

3   Click the **Application Rights** tab.

4   Under Application Rights granted to this Role, do one or more of the following:

Click this	To do this
ADD APPLICATION RIGHTS	Open the *Select Application Rights* window and select one or more application rights that this role can grant to other roles
REMOVE APPLICATION RIGHTS	Remove this role's permission to grant the selected application right(s) to other roles

5   When you are done, click **Save**.

BTRS displays the message, "[name of role] successfully saved."

Updating Management Rights Assigned to Roles

If a role's management requirements change, you can update which rights are assigned to that role.

▸   **To update a role's assigned application rights**

The following steps assume that you have navigated to the *Manage Roles* screen.

1   On the *Manage Roles* screen, in the left pane, expand the directory tree.

2   Right-click the role you want to update, and click **Edit Role**.

In the right pane, the *Edit Role [name of role]* form appears.

3   Click the **Management Rights** tab.

For more information about what permissions each section provides, see "Assigning Management Rights to Roles" on page 58.

4   In each section of the form, do one or more of the following:

Click the section's	To do this
"ADD" button	Open the corresponding window and select one or more items to apply to this role
"REMOVE" button	Remove the selected item from this role's profile

5   When you are done, click **Save**.

BTRS displays the message, "[name of role] successfully saved."

Viewing Role Details

You can see how a role is configured through the Manage Roles function, including the which users are assigned to the role, which roles the role can alert, which role groups to role belongs to, and the role's assigned management and application rights.

▶ **To view a role's details**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* screen appears.

3   In the left pane, on the **Directory View** tab, expand the tree to locate the role you want to view.

4   Click the role's name.

In the right pane, the role's information displays.

Searching for Existing Roles

After you have created roles, you can search for them at any time in the Role Directory. BTRS enables you to search for roles either by entering all or part of the name of the role.

Only those roles that you have permission to manage appear in the search results.

▶ **To search for existing roles**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   In the left pane, click the **Search** tab.

Letters you enter in this field are not case sensitive.

3   In the **Find Role** field, type the search string you want to use:

For example, type this	To search for
d	All roles with words containing the letter "d"
dir	All roles with words containing the string "dir"
director	All roles with words containing the string "director"

4   Click **go**.

BTRS searches for and displays a list of roles with names containing the search criteria you entered.

– or –

If no roles are found, BTRS displays the message "no roles found."

5   To view a role's profile, click the name of the role.

Working with Role Groups

Role groups, like OUs, provide another method of structuring the roles and users in your organization. In addition, users can also choose to send alerts to a role group, rather than selecting all roles individually. BTRS Admins can also create subscriptions for and assign document folder permissions by role group.

After creating a role group, you can rename the role group, as well as change or remove the roles assigned to the group.

You cannot delete role groups from the Role Group Directory. For more information or for help with this feature, please contact Virtual Alert.

Creating Role Groups

When you create a role group, you need to assign one or more roles to manage the role group. In addition, each role you assign to the group can receive alerts sent to the role group. You can also create subscriptions, as well as set up folder permissions in the Document Library, based on role group.

▶ **To create a role group**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Role Groups**.

The *Manage Role Groups* screen appears.

3   In the left pane, right-click **Role Groups**, then click **Create New Role Group**.

In the right pane, the *Create New Role Group* form appears.

4   In the **Name** field, type the name of the role group.

5   In the **Description** field, type a brief comment about the roles in this role group.

This information appears on the details screen for that role group.

6   Under Roles that can manage this Role Group, click **ADD ROLES**.

BTRS opens the *Select Roles* window.

You may also search for the role on the **Search** tab, or select from an alphabetical listing on the **List** tab.

7   On the **Tree** tab, locate and double-click the role(s) you want to include in this role group.

8   Click **OK**.

BTRS closes the *Select Roles* window, and displays the role(s) you select in the **Roles assigned that can manage this Role Group** list.

To view information about a particular role you have selected, click the name of the role, then click **View Role**.

9   Click **Save**.

– or –

Leave the form open and skip to the next section to assign one or more roles to the role group.

After saving the role group, BTRS displays the message, "This Role Group has not been assigned a Role. Are you sure you want to save this Role Group without an assigned Role?"

10   Click **OK** to save without assigning a role.

BTRS displays the message, "[name of role group] successfully saved."

11   Click **OK** to refresh the Role Group Directory.

Assigning Roles to Role Groups

You can either assign one or more roles to a role group when you create the role group, or at a later time.

▶   **To assign roles to a role group**

1   Follow the steps in "To create a role group" on page 67 to access the *Create New Role Group* form.

– or –

In the Role Group Ddirectory, right-click the name of the role group, and click **Edit Role Group**.

In the right pane, the *Edit [name of role group]* form appears.

2   Under Roles assigned to this Role Group, click **ADD ROLES**.

BTRS opens the *Select Roles* window.

You may also search for the role on the **Search** tab, or select from an alphabetical listing on the **List** tab.

3   On the **Tree** tab, locate and double-click the role(s) you want to include in this role group.

4   Click **OK**.

BTRS closes the *Select Roles* window, and displays the role(s) you select in the **Roles assigned to this Role Group** list.

To view information about a particular role you have selected, click **View Role**.

Editing Role Groups

After creating a role group, you can change the name of the role group, as well as add or remove other roles from within the group, or those assigned to manage the group.

You cannot delete role groups from the Role Group Directory. If you need to delete a role group, please contact Virtual Alert.

Renaming Role Groups

If you need to do so, you can rename a role group without disturbing any of the roles within the group.

▸ **To rename a role group**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Role Groups**.

    The *Manage Role Groups* screen appears.

3   In the left pane, expand the tree directory.

4   Right-click the name of the role group you want to rename, and click **Rename Role Group**.

    In the right pane, the *Rename [name of role group]* form appears.

5   In the **New Role Group Name** field, update the current role group name.

6   Click **Save**.

    BTRS displays the message, "Are you sure you want to rename [old role group name] to [new role group name]?"

7   Click **OK**.

    BTRS displays the message, "[old role group name] was successfully renamed to [new role group name]."

8   Click **OK** to refresh the Role Group Directory tree.

Updating Roles Assigned to Role Groups

If you need to update the roles assigned to a role group, you can add or remove one or more roles. In addition, you can also change the roles assigned to manage a role group by adding or removing one or more roles.

▸ **To update the roles assigned to a role group**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Role Groups**.

    The *Manage Role Groups* screen appears.

3   In the left pane, expand the tree directory.

4   Right-click the name of the role group you want to rename, and click **Edit Role Group**.

In the right pane, the *Edit [name of role group]* form appears.

5   Perform one or more of the following tasks:

To do this	Do this
Add a role to the role group	Under Roles assigned to this Role Group, click **ADD ROLES**, then select the role(s) you want to add from the *Select Roles* window
Remove a role from the role group	Under Roles assigned to this Role Group, click **REMOVE ROLES**
Add a managing role	Under Roles that can manage this Role Group, click **ADD ROLES**, then select the role(s) you want to add from the *Select Roles* window
Remove a managing role	Under Roles that can manage this Role Group, click **REMOVE ROLES**

6   When you are done, click **Save**.

BTRS displays the message, "[name of role group] successfully saved."

7   Click **OK** to refresh the Role Group Directory tree.

Viewing Role Group Details

You can see how a role group is configured through the Manage Role Groups function, including the which roles are assigned to the role group, and which role is assigned to manage the role group.

▶ **To view a role group's details**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Role Groups**.

The *Manage Role Groups* screen appears.

3   In the left pane, on the **Directory View** tab, locate the role group you want to view.

4   Click the role group's name.

In the right pane, the role group's information displays.

6 Working in the User Directory

Users function as the smallest element of organization in BTRS. User accounts provide information about each user with access to the BTRS portal, including that person's contact information, job and specialty information, what type of BTRS license the user has been given, and the roles that user serves. In addition, users can create their own passwords and security codes, and alerting profiles.

In the User Directory tree, you can create user-based Organizational Units (OUs) to help organize the profiles of those people who access and use BTRS. While this structure can be created in the same way as the Role Directory, you can also choose to create user OUs that reflect a different framework, such as by the user's last name, the locations the users work in, or who the users work for.

BTRS enables you as an administrator to create and maintain information in user accounts, reset password and alerting security information, and to search for and deactivate users in the user directory as necessary.

Information presented in this chapter assumes that the role to which you have been assigned can manage the user accounts, organizational units, and roles you are working with.

Working with User OUs

You can work with Organizational Units (OUs) in the BTRS Admin section in two ways: through the User Directory, and through the Role Directory. In the User Directory, users are grouped into Organizational Units (OUs), which can be based on geographic area, teams, or other methods you choose. While the processes setting up and maintaining OUs in either directory are quite similar, the OUs you set up, and their corresponding functionality and purpose, may be quite different.

OUs in the User Directory serve to help you organize all the users in your HAN. When you set up OUs in the User Directory, you can emulate your organization's structure for easy maintenance.

After you create an OU, you can rename or move the OU to another location in the tree. When you move an OU to another location, all sub-OUs and the users within them move as well.

You cannot delete OUs from the User Directory. If you need to delete an OU, please contact Virtual Alert.

Creating User OUs

The first step in setting up your User Directory is to create the user OUs that will serve as the organizational backbone of the directory.

▸ **To create an OU in the User Directory**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2   Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* screen appears.

3   In the left pane, expand the directory tree.

4   Right-click the User Directory OU, and click **Create New OU**.

If you are creating an OU that will reside within another OU, right-click the name of the parent OU.

In the right pane, the *Create New OU within User Directory* form appears.

5   In the **New OU Name** field, type a name for the OU.

6   Click **Save**.

BTRS displays the message, "[name of OU] was successfully created."

7   Click **OK**.

The directory tree refreshes. When you expand the tree, the new OU appears.

Editing User OU Profiles

After you create an OU, you can rename or move the OU to another location in the tree. When you move an OU to another location, all sub-OUs and the roles within them move as well.

You cannot delete user OUs from the User Directory. If you need to delete an OU, please contact Virtual Alert.

Renaming User OUs

Should you need to change the name of an OU, you can update the name of the OU without affecting any sub-OUs or users contained within it.

▸ **To rename a user OU**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2   Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* screen appears.

3   In the left pane, expand the directory tree.

4   Right-click the name of the OU you want to rename, and click
    Rename OU.

    In the right pane, the *Rename OU [name of OU]* form appears.

5   In the **New OU Name** field, type the new name of the OU.

6   Click **Save**.

    BTRS dispalys the message, "Are you sure you want to rename [old
    OU name] to [new OU name]?"

7   Click **OK**.

    BTRS displays the message, "[old OU name] successfully renamed to
    [new OU name]."

8   Click **OK**.

    The directory tree refreshes. When you expand the tree, the new OU
    appears.

Moving User OUs

You can also move a single
user to another location in the
directory. For more information,
see "Moving Users to Different
OUs" on page 74.

Should you need to, you can move an entire OU (and all of its contents) to
another location in the directory.

▸   **To move a user OU**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

You can also access BTRS
Admin menu functions from the
BTRS Admin submenu.

2   Under Manage Groups and Users, click **Manage Users**.

    The *Manage Users* screen appears.

3   In the left pane, expand the directory tree.

4   Right-click the name of the OU you want to move, and click **Move
    OU**.

    In the right pane, the *Move OU [name of OU]* form appears.

5   Next to the Currently Selected OU field, click **SELECT OU**.

    BTRS opens the *Select User OUs* window.

6   Double-click the name of the OU that will serve as the new parent
    OU.

To move the OU to the highest level in the directory, select the User Directory
OU.

7   Click **OK**.

    BTRS closes the *Select User OU*s window, and displays the name of
    the OU in the **Currently Selected OU** field.

8   Click **Move**.

    BTRS displays the message, "Are you sure you want to move [name
    of OU] and all of its contents to [new location]?"

9   Click **OK**.

BTRS displays the message, "[name of OU] was successfully moved to [new location]."

10   Click **OK** to refresh the User Directory tree.

Moving Users to Different OUs

For more information about planning your directory setup, see "Planning Your Directory Setup" in Chapter 4, page 42.

When you create a user account, it becomes part of the User Directory structure. If you create user OUs before setting up your user account, each user is automatically "assigned" to the OU within which it resides. If you decide to create users first, you can then move the user under its appropriate OU at a later time. Organizing your users within OUs can help tremendously with the maintenance of your directory, and for assigning management rights to OUs in the directory.

You can also move an entire OU (including all its users) to another location in the directory. For more information, see "Moving User OUs" on page 73.

‣   **To move a single user to a different OU**

The steps in this process assume both the user and OU have been created. For more information about creating user OUs, see "Creating User OUs" on page 72. For more information about creating user, see "Creating Users" on page 77.

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* screen appears.

3   In the left pane, expand the directory tree.

4   Right-click the user you want to move, and click **Move User**.

In the right pane, the *Move User [name of user]* form appears.

5   Next to the Currently Selected OU field, click **SELECT OU**.

BTRS opens the *Select User OUs* window.

You may also search for the OU on the **Search** tab, or select from an alphabetical listing on the **List** tab.

6   On the **Tree** tab, locate and double-click the OU to which you move this user.

7   Click **OK**.

The name of the user appears in the **Currently Selected OU** field.

8   When you are done, click **Save**.

BTRS displays the message, "Are you sure you want to move [name of user]?"

9   Click **OK**.

BTRS displays the message, "[name of user] was successfully moved to [name of OU]."

▶ **To move multiple users to another OU**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Users**.

    The *Manage Users* screen appears.

3   In the left pane, expand the directory tree.

4   Right-click the OU that you want to move the users to, and click **Move Users to this OU**.

    In the right pane, the *Move Users to [name of OU]* form appears.

5   Under Selected Users, click **ADD USERS**.

    BTRS opens the *Select Users* window.

6   Select one or more users you want to move to the new OU.

7   Click **OK**.

    BTRS closes the *Select Users* window, and displays the users in the **Selected Users** list.

8   Click **Move**.

    BTRS displays the message, "Are you sure you want to move the selected User(s) to [name of new OU]?"

9   Click **OK**.

    A message displays, showing all users assigned to the parent OU.

Assigning Managers to User OUs

As you create OUs and users within those OUs, you can designate one or more roles to manage OUs in the User Directory. By default, users are not given permission to view any other users or OUs in the User Directory. If the users in a particular role, however, need to view, change, or add User Directory information, you can select specific OUs for that role to manage, which then become visible in the User Directory.

Before users can view the OUs they are assigned to manage, you must assign each user to the role managing the OU.

You can assign managers to OUs in the User Directory tree by selecting the user OU the role will manage.

▶ **To assign user OU managers**

The steps in this process assume both the user OU and role that will manage it have been created. For more information about creating user OUs, see "Creating User OUs" on page 72. For more information about creating roles, see "Creating Roles" in Chapter 5, page 53.

1 On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* screen appears.

2 Under Manage Groups and Users, click **Manage Users**.

   The *Manage Users* screen appears.

3 In the left pane, expand the directory tree.

4 Locate the name of the OU to which you want to assign a managing role.

5 Right-click the OU, and click **Assign OU Managers**.

   In the right pane, the *Assign Managers to [name of OU]* form appears.

6 Under Current Managers, click **ADD ROLES**.

   BTRS opens the *Select Roles* window.

You may also search for the role on the **Search** tab, or select from an alphabetical listing on the **List** tab.

7 On the **Tree** tab, locate and double-click the role(s) you want to manage this OU.

8 Click **OK**.

   In the right pane, the role appears in the **Current Managers** list.
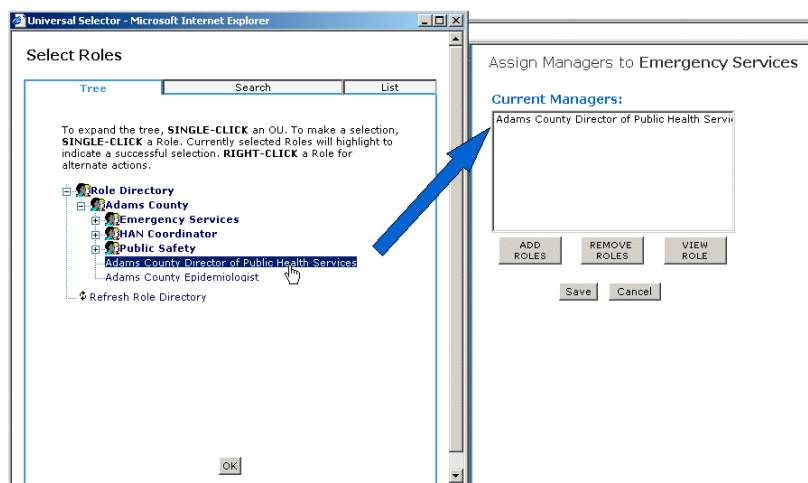
9 When you are done, click **Save**.

   BTRS displays the message, "The following roles have been assigned as managers of [name of OU]: [name of role]."

10 Click **OK** to refresh the User Directory tree.

Working with Users

Within the User Directory, you can create new and work with existing user profiles, assigning users to roles and OUs. BTRS administrators can reset users' passwords and alerting security codes, and modify user profiles. In addition, administrators can deactivate users who no longer need access to the BTRS portal.

Creating Users

When you create a BTRS user, you set up the initial profile for that user, including the user's username and password, and the type of license that user will have. Each user belongs to a specific OU. You can choose also to assign each user to a role when you create the account, or assign users to roles through the Manage Roles function. In addition, you can enter the user's contact information, or allow the user to enter this information the first time he or she logs in to the BTRS portal.

Before you create user accounts, Virtual Alert recommends that you create the OU structure for your user directory. Doing so enables you to create users within the appropriate OU and assign roles. Doing so will save you from having to move the users into an organizational structure later. For more information about planning the setup of your user directory, see "Planning Your Directory Setup" in Chapter 4, page 42.

▸ **To create a user account**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   In the left pane, on the **Directory View** tab, expand the tree to locate the OU in which you want to create the user account.

3   Right-click the name of the OU, and click **Create New User**.

In the right pane, the *Create New User Within [name of the OU]* screen displays.

4   On the **Required Information** tab, enter the following information:

In this field or list	Do this
Prefix	Select **Dr.**, **Mr.**, **Mrs.**, or **Ms.**
First Name	Type the user's first name (required)
Last Name	Type the user's last name (required)
Work Email	Type the user's e-mail address at work

In this field or list	Do this
User ID	Type the username the user will user to log in (this value cannot be changed) User IDs cannot exceed 20 characters
Password	Type a password for the user to log in with
Verify Password	Reenter the user's password
Licenses	Select **Alerting License**, **BTRS Admin License**, or **BTRS Collaboration License**

For more information about which license to select, see "Understanding License Types" in Chapter 1, page 4.

5   On the **Work Contact** tab, enter the following information.

– or –

You may skip this step and allow the user to enter this information upon log in.

In this field or list	Do this
Organization	Type the name of the user's organization
Title	Type the user's professional title
Business Category	Select the type of industry the user works in
Professional Licenses	Select one or more professional licenses the user holds *Press* **CTRL** *while clicking to select more than one type*
Specialties	Select one or more medical specialties the user practices *Press* **CTRL** *while clicking to select more than one type*
Work Location	Type information about where the user works, such as Building 1045, Intensive Care Wing, or Sacramento

In this field or list	Do this
Work Address	Type the address of the facility the user works in
Work City	Type the name of the city in which the facility is located
Work State/Province	Select the state or province in which your facility is located
Work Zip/Postal Code	Type the ZIP or Postal code for the facility in which the user works *You must enter 5-10 characters*
Work Phone	Type the user's work phone number, including area code and any extension *You must enter at least 10 digits*
Work Fax	Type the user's work fax number, including area code *You must enter 10 digits*

6   On the **Home Contact** tab, enter the following information.

   – or –

   You may skip this step and allow the user to enter this information upon log in.

In this field or list	Do this
Home Address	Type the user's home address
Home City	Type the name of the city in which the user lives
Home State/Province	Select the state or province in which the user lives
Home Zip/Postal Code	Type the ZIP or Postal code for the city in which the user lives *You must enter 5-10 characters*
Home Phone	Type the user's home phone number, including area code *You must enter 10 digits*

7   On the **Alternate Contact** tab, enter the following information.

– or –

You may skip this step and allow the user to enter this information upon log in.

In this field or list	Do this
Cell Phone	Type the user's cell phone number, including area code *You must enter 10 digits*
Numeric Pager	Type the phone number of the user's numeric pager *You must enter 10 digits*
Alpha Pager	Type the e-mail address of the user's alpha-numeric pager
Alt. Phone	Type a phone number other than that of the user's primary work, home, or cell phones, including area code *You must enter at least 10 digits*
Alt. Email	Type an e-mail address other than the user's work e-mail address Enter the complete address; for example: `joe_user@ca.gov` or `fred.smith@hospital.org`
Satellite Phone	Type the number of the user's satellite phone, including area code
Other	Provide information for any additional means people may use to contact the user

8   On the **Misc. Personal** tab, enter the following information.

– or –

You may skip this step and allow the user to enter this information upon log in.

In this field or list	Do this
Degrees	Type any degrees the user holds
Languages Spoken	Select one or more languages the user speaks

In this field or list	Do this
CPR Certified	Select this check box if the user is CPR certified

9   Click **Save**.

– or –

Leave the screen open and skip to the next section to assign the user to one or more roles.

After saving the user account, BTRS displays the message, "This User has not been assigned a Role. Are you sure you want to save this User without an assigned Role?"

10   Click **OK** to save without assigning a role.

BTRS displays the message, "User Account for [name of user] successfully created in [name of OU]."

11   Click **OK** to refresh the User Directory tree.

You can save the user's profile without assigning the user to a role, however, the user will not receive alerts until he or she is assigned to a role.

Assigning Users to Roles

BTRS enables you to assign users to roles either through the Manage Users function or through the Manage Roles function.

In the first case, you assign an individual user to his or her roles; you likely would assign roles on a one-by-one basis after the initial setup, on an ongoing maintenance basis.

In the second case, you access the role and assign all users who perform that function; this method might save time when you first create your user directory by allowing you to create all users, then assign roles in bulk.

This section describes the process for assigning users to roles through the Manage Users function. For information on assigning roles to users through the Manage Roles function, see "Assigning Users to Roles" in Chapter 5, page 54.

▶ **To assign users to roles through the Manage Users function**

1   Follow the steps in "To create a user account" on page 77 to create a user account.

2   On the **Roles** tab, click **Add Roles**.

BTRS opens the *Select Roles* window.

3   On the **Tree** tab, expand the tree to locate the role you want to assign to the user.

You may select as many roles as pertain to that user's job functions.

*You may also search for the role on the **Search** tab, or select from an alphabetical listing on the **List** tab.*

4   Click **OK**.

BTRS closes the *Select Roles* window, and displays the role(s) you select in the **Roles assigned to this User** list.

To view information about a particular role you have selected, click the name of the role, then click **View Role**.

Viewing User Profiles

You can see how an individual user's account is configured through the Manage Users function, including the user's account information, management rights, and the user's profile summary, contact information, and personal information.

▶ **To view a user's profile**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* screen appears.

3   In the left pane, on the **Directory View** tab, expand the tree to locate the user you want to view.

4   Click the user's name.

In the right pane, the user's profile and account information display.

Editing User Profiles

After you save a user's account, you can make modifications to the account, including:

- Updating contact information
- Adding or deleting roles assigned to the user
- Updating the user's alerting profile(s)
- Resetting the user's password
- Resetting the user's security code

Changes you make to an active user account may take up to 15 minutes to take effect.

▶ **To edit a user's account profile**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   In the left pane, on the **Directory View** tab, expand the tree to locate the user account you want to update.

3   Right-click the user's name, and click **Edit User Properties**.

In the right pane, the *Edit User [name of the user]* form displays.

4   Modify the user's profile and assigned roles as necessary.

5   Click **Save**.

BTRS displays the message, "User Account for [name of user] successfully saved!"

BTRS sends an e-mail notification to the user to inform him or her that the profile was updated.

Editing Alerting Profiles

Should you need to, you can update a user's alerting profiles, including modifying or deleting existing profiles or creating new profiles.

▶   **To edit an alerting profile**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   In the left pane, on the **Directory View** tab, expand the tree to locate the user account for which you want to update alerting profiles.

3   Right-click the user's name, and click **Edit Alerting Profiles**.

In the right pane, the *Change Alerting Profiles for [name of user]* form appears.

4   Select an existing profile, and perform one or more of the following functions:

Click this	To do this
Activate	Activate that profile
Edit	Display the *Profile Name* screen For information about editing alerting profiles, see the *User Guide*
Delete	Delete that profile

– or –

To create a new profile, click **New**.

The *Profile Name* screen displays. For more information about creating new alerting profiles, see the *User Guide*.

Resetting User Passwords

Should you need to, you can reset a user's password so they can access the BTRS portal.

Original passwords do not display in the user's profile, however, the user can choose to change his or her password to the password he or she previously used.

▶ **To reset a user's password**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

2   In the left pane, on the **Directory View** tab, expand the tree to locate the user account for which you want to reset the password.

3   Right-click the user's name, and click **Reset User Password**.

    In the right pane, the *Reset Password for [name of user]* form appears.

4   In the **New Password** field, type a new password for the user.

5   In the **Verify Password** field, reenter the new password.

6   Click **Save**.

    BTRS displays the message, "Password successfully reset for [name of user]!"

7   Click **OK**.

Resetting Alerting Security Codes

Should you need to, you can reset a user's security code so they can access alerting messages over the phone.

Original security codes do not display in the user's profile, however, the user can choose to change his or her security code to the one he or she previously used.

▶ **To reset a user's security code**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

2   In the left pane, on the **Directory View** tab, expand the tree to locate the user account for which you want to reset the security code.

3   Right-click the user's name, and click **Reset Alerting Security Code**.

    In the right pane, the *Reset Alerting Security Code for [name of user]* form appears.

4   In the **New Alerting Security Code** field, type a new security code for the user.

5   In the **Verify Alerting Security Code** field, reenter the new code.

6   Click **Save**.

    BTRS displays the message, "Alerting security code successfully reset for [name of user]!"

7   Click **OK**.

Deactivating Users

When a user no longer needs to access the BTRS portal, you can deactivate the account to prevent unauthorized entry.

Take care in selecting users for deactivation. Once removed from the User Directory, you cannot reactivate a user account. For more information on or for help with this feature, please contact Virtual Alert.

▸ **To deactivate a user**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   In the left pane, on the **Directory View** tab, expand the tree to locate the user account you want to deactivate.

3   Right-click the user's name, and click **Deactivate User**.

BTRS displays the message, "Are you sure you want to deactivate [name of user]?"

4   Click **OK** to confirm.

BTRS displays the message, "User [name of user] has been deactivated."

– or –

If you want the user to remain active, click **Cancel**.

Searching for Existing Users

After you have created user accounts, you can search for individual users in the user directory. BTRS enables you to search for users either by entering all or part of the user's name.

Only those users whose roles or role groups you have permission to manage appears in the search results.

▸ **To search for existing users**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   In the left pane, click the **Search** tab.

3   In the **Find User** field, type the search string you want to use:

For example, type this	To search for
D	All users whose names (first or last) contain the letter "D"

For example, type this	To search for
Del	All users whose names (first or last) contains the string "Del"
Delgado	All users whose names (first or last) contain the string "Delgado"

4   Click **go**.

BTRS searches for and displays a list of users with names containing the search criteria you entered.

– or –

If no users are found, BTRS displays the message "no users found."

5   To view a user's profile, click the user's name.

7 Generating Reports and Logs

To augment the numerous functions that BTRS provides, BTRS administrators have the ability to generate several reports and logs to maintain and track data, documents, and users within the portal. Each log or report provides a detailed analysis of one or more facets of the BTRS system, including the Document Library, the alerting system, and the User Directory.

This chapter provides both steps for generating each report, and where applicable, an overview of the details included in the results. This chapter assumes that you have a BTRS Admin license, and appropriate management or alerting permissions to generate each log or report.

User Reports

BTRS provides three user-based reports for BTRS administrators to review information entered in user profiles. Each report allows administrators to view profile information for only those users in roles or OUs that the administrator can manage.

Basic User Report

The Basic User Report enables BTRS administrators to view select profile information for all users within the role and user OUs the administrator's role can manage. The report displays only the profile information you choose for each user you are able to manage.

The report can help you locate a particular aspect of each user's profile, such as a cell phone or pager number; what type of license each user is assigned; or which roles each user is assigned to. Conversely, the report can help you locate what information might be missing from users' profiles.

After generating the Basic User Report, you can export the results directly to a Microsoft® Excel spreadsheet. Use the steps in "To export Basic User Report data" on page 89 to complete the data export.

You can select one or more profile items to include in the report from the following types of information:

- Personal information
- Work contact information

- Home contact information
- Alternate contact information
- Miscellaneous personal information
- User account information

The data displayed in the report is determined by the information each user enters in his or her profile.

▶ **To generate a Basic User Report**

1   On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* screen appears.

2   Under Manage Groups and Users, click **Basic User Report**.

   The *Basic User Report* form opens.

3   For each section, select one or more options to include in the report.

   – or –

   To include all the elements of a particular section, click the **select all** link next to the section's title.

4   When you are done, at the bottom of the screen, click **submit**.

   The query results display on the screen.

Basic User Report (selected criteria displayed)

▶ **To export Basic User Report data**

1   After completing the previous steps in "To generate a Basic User Report" on page 88, right-click anywhere on the displayed results, and click **Export to Microsoft Excel**.

BTRS opens the *Connect to [URL of portal]* dialog box.

2   Enter your BTRS username and password, and click **OK**.

The Basic User Report results are imported into a new Microsoft[®] Excel worksheet.

Directory Extract

The Directory Extract provides profile information for each user in the role and user OUs that a BTRS administrator has permission to manage. The Directory Extract enables you to search for and view all the available profile information for only those users who meet the criteria you specify in your query. In addition, you can select whether to export the query results to an .html page, a .csv file (to import into Microsoft[®] Excel or other table), or to an .xml file (to import into other databases).

For example, the report can help you quickly locate all users who speak a particular language, have entered a cell phone number, or work in a particular city or state. Conversely, you can easily review the results to determine which users have not entered information in their user profiles.

▶ **To create a directory extract**

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2 Under Manage Groups and Users, click **Directory Extract**.

The *Directory Extract* form opens.

3 In the first drop-down list, select the user profile item you want to search for, such as **Last Name**, **City**, or **Cell Phone**.

4 In the second drop-down list, select the term that best suits your search type:

Select this term	To search for items in the first column that
Contains	Include anywhere the text you type in the next step For example, to search for the city "Richmond", type "ri" or "mond" in the third field
Equals	Match exactly the text you type in the next step For example, to search for the city "Richmond", type "Richmond"
Starts with	Begin with the text you type in the next step For example, to search for the city "Richmond", type 'r", "ri", or "rich" in the third field
Ends with	End with the text you type in the next step For example, to search for the city "Richmond", type "mond" or "d" in the third field

5 In the third field, type the text you want to search for, based on the information you entered in the first and second lists.

6 Repeat step 3 - step 5 for each criterium you want to include in the query.

7 On the right side of the screen, select **AND** if you want BTRS to search for users who meet all the criteria you specify.

– or –

Select **OR** if you want BTRS to search for users who meet any of the criteria you specify.

8 Under the criteria you entered, select one of the following extract options:

Select this option	To format the extract in this way
HTML	Results appear in a Web browser window (saved as an .html file)
CSV	Results appear in a Microsoft® Excel window (saved as a .csv file)
XML	Results appear in a Web browser window (saved as an .xml file)

9 Click **search**.

BTRS generates the query results in the format you requested.

– or –

If no users meet the criteria you entered, BTRS displays the message, "No users could be found that meet the search criteria! Please modify your search and try again."

10 Click **Save** to save the extract results on your computer.

– or –

Click **Open** to view the results.

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(7 Users returned)

Last Name	First Name	Organization	Title	Degrees	Business Category	Professional Licenses	Specialties	Work Location	Work Address	Work City
Edwards	Chris	-	-	-	Public Health	Food/Nutrition, Environmental	-	-	-	San Diego
Goldstein	Anita	-	-	-	-	-	-	-	-	Aberdeen
Oldenburg	Harriet	-	Epidemiologist	-	Public Health	Food/Nutrition, Environmental, Educator	-	-	-	La Jolla
Rankin	Georgette	-	-	-	-	-	-	-	-	Altuna
Smith	Bernard	-	-	-	-	-	-	-	-	San Diego
Starks	Brenda	Hamilton County Public Health Department	HAN Coordinator	-	Public Health	-	-	-	-	Annapolis
Wochenski	Allan	-	-	-	-	-	-	-	-	San Simeon

Directory Extract results (selected criteria displayed)

Blast Fax Report

The Blast Fax Report enables BTRS administrators to create Comma Separated Value (.csv) files to use in conjunction with external blast fax applications. All the role(s) or role group(s) that you have permission to alert appear in the *Creating Blast Fax Report* form.

The report includes each user's first and last name, and the fax number entered in that user's profile. In addition, you can elect to include or exclude those users who have not entered fax numbers.

▶ **To generate a Blast Fax Report**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Reports and Logs, click **Blast Fax Report**.

The *Creating Blast Fax Report* form opens.

You may select as many roles and or role groups as you wish. In the right pane, roles and role groups you select appear in the **Roles for Report** list.

3   In the left pane, in the tree, do one or more of the following:

To do this	Do this
Select individual roles and/or role groups	Click each role and/or role group to which you want to send the alert
Select all roles within an OU	Right-click the OU that contains the roles or role groups you want to include in the alert, and click **Select All Roles in OU**
Select all roles within an OU and its sub-OUs	Right-click the OU that contains the sub-OUs and roles you want to include in the alert, and click **Select All Roles in OU and Sub OUs**

Only the roles and role groups you have permission to alert appear in the tree.

4   Select the **Include Users without Fax Numbers** check box if you want to generate a report that includes all the users in the roles and role groups you select, regardless of whether all users have entered a fax number in their profiles.

5   Click **CREATE REPORT**.

BTRS displays the message, "Are you sure you want to create this report?"

6   Click **OK**.

BTRS generates the report in a .csv file format.

7   Click **Open** to view the results.

– or –

Click **Save** to save the file on your computer.

Alert Reports

BTRS provides a log for BTRS administrators to view alerts sent by users you can manage. The Alert History Log enables you to search for and view the details of each alert sent.

Alert History Log

The Alert History Log enables you to search for and view the details of alerts sent by users you can manage. You can search for alerts sent by specific individuals, as well as by the role the alert was sent to, and the period of time during which it was sent.

The values you provide in each field in the *Alert History Logs* form are optional. To view all the alerts sent by all users you can manage, leave all fields blank, then click **Search**.

To read more information about the details included in the log, see "About the Alert History Log" on page 95.

▶ **To generate an Alert History Log**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Reports and Logs, click **Alert History Log**.

The *Alert History Logs* form opens.

You can enter values for each field in the form as necessary; the values you provide are optional. To view all the alerts sent by users you can manage, leave all fields blank, then click **Search**.

3   In the **Sent on or after** date field, type or select the date on or after which the alert was sent.

Click the calendar icon next to the field to view and select from dates on the calendar.

4   In the **Sent before date** field, type or select the date on or before the alert was sent.

Click the calendar icon next to the field to view and select from dates on the calendar.

5   In the **Role sent to** field, type the name of the role or role group the alert was sent to.

You can type some or all of the first word of the title only, or type the complete title, to search for sent alerts. For example, to view alerts sent to the Northwest Region HAN Coordinator, type "`north`" or "`northwest`".

Only those alerts sent by users you can manage appear in the results of your search, regardless of which role(s) or role group(s) the alert is sent to.

6   In the **From** field, type the name of the user who sent the alert.

You can type some or all of the user's first name. For example, to search for the user named George Krantz, type "`g`" or "`geo`".

7   Click **Search**.

The alerts meeting your criteria display on the bottom half of the screen. To view additional pages of results, click the numbers above or below the alerts.

– or –

If no alerts match the criteria you enter, under the Search Criteria section, BTRS displays the message, "Found 0 records."

About the Alert History Log

The Alert History Log provides a list of all alerts sent that match the date/ time, role, and/or user criteria you enter.

Action	▼Date/Time Sent	Expiration	Sent From	Subject	Priority
N/A	8/26/2004 9:31:05 AM	8/31/2004 9:31:05 AM	Brooke Manly	Early Warning Siren System Testing This Week	Medium
N/A	8/25/2004 10:14:10 AM	8/26/2004 10:14:10 AM	Harriet Oldenburg	Preparation for Chemical Release Investigation	↓ Low
N/A	8/25/2004 10:10:16 AM	8/26/2004 1:10:16 PM	Chris Edwards	Potential Evacuation in Littlefield Due to Chemical Release	Medium
N/A	8/24/2004 2:28:17 PM	8/28/2004 2:28:17 PM	Georgette Rankin	Chemical Exposure in Littlefield	! High
N/A	8/24/2004 2:27:22 PM	8/31/2004 2:27:22 PM	Georgette Rankin	Major Spillage in Littlefield Accident - Trucks Carrying Chemicals	! High
N/A	8/14/2004 1:43:23 PM	8/14/2004 2:43:23 PM	Chris Edwards	Investigation Results	↓ Low

1

Alert History Log (sorted by sent date/time)

For more information about reviewing the details of a sent alert, see the *User Guide*.

The log includes the following information:

This column	Includes the following information
Action	If applicable, the Cancel button; otherwise, displays **NA** (Not Applicable) Click the **Cancel** button to cancel an active alert
Date/Time Sent	The date and time the alert was sent Click the link to view the alert's details on the *Alert Details* screen
Expiration	The date and time the alert expires
Sent From	The name of the user who sent the alert
Subject	The text the sender entered in the **Subject** field
Priority	The priority the sender selected (**Low**, **Medium**, or **High**)

Document Reports

BTRS contains several reports and logs to help BTRS administrators track and monitor activity within the Document Library. These reports and logs provide historical data for documents that have been checked out, modified, reside in a particular folder, or are waiting to be approved.

Documents Checked Out Log

The Documents Checked Out Log provides a list by document title of all documents currently checked out from folders you can manage. The log provides information about the document, the folder it in which it is located in the Document Library, the user who checked the document out, and the date and time the user checked it out.

To read more information about the details included in the log, see "About the Documents Checked Out Log" on page 97.

▸ **To generate a Documents Checked Out Log**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Reports and Logs, click **Documents Checked Out Log**.

The *Documents Checked Out Log* screen appears, displaying all documents currently checked out.

About the Documents Checked Out Log

The Documents Checked Out Log is an automatically generated log that displays a complete list of all documents currently checked out to users.

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BTRS Admin Menu ▼ | Home |

Title	Folder	Checked Out By	Date
Lightning—The Underrated Killer	../Documents/Public Health Information	STATEHAN\swilliams	9/2/2004 9:12:29 AM
Fight the Bite! Avoid Mosquito Bites to Avoid Infection	../Documents/Public Health Information	STATEHAN\holdenburg	9/3/2004 9:17:16 AM
BTRS 2.3a Administrator Guide	../Documents/BTRS Documentation	STATEHAN\msonnell	9/3/2004 9:17:50 AM
A Reporter's Guide to Terrorism: A Practical Guide to the Threat of Terrorism	../Documents/Public Relations/Media Releases	STATEHAN\msonnell	9/7/2004 10:42:00 AM
CDC Offers Advice for People to Protect Themselves During and After a Hurricane	../Documents/Public Relations/Media Releases	STATEHAN\holdenburg	9/10/2004 10:42:10 AM
Flood Recovery Bulletin: Tips for Post-flood Sanitation and Hygiene	../Documents/Public Relations/Media Releases	STATEHAN\holdenburg	9/17/2004 10:42:18 AM

Documents Checked Out Log

You can check in a document that has been checked out by another user through the *Document Inspection* screen. For more information about undoing a checked out document, see "Managing Checked Out Documents" in Chapter 3, page 30.

The log includes the following information:

This column	Includes this information
Title	The title of the document Click the link to display the document's information on the *Document Inspection* screen
Folder	The location where the document is stored in the Document Library
Checked Out By	The username of the person to whom the document is checked out (in domain/username format)
Date	The date and time the document was checked out

Documents Awaiting Approval Log

The Documents Awaiting Approval Log enables BTRS administrators to view documents that have been added to the Document Library in folders you manage, but that have not yet been approved for publishing. In addition, you can either approve or reject documents for other users in the case that the document needs to be worked on or published without the approval of a designated user. You do not need to be an assigned approver to view or approve/reject the documents in this log.

To read more information about the details included in the log, see "About the Documents Awaiting Approval Log" on page 98.

▸ **To generate a Documents Awaiting Approval Log**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Reports and Logs, click **Documents Awaiting Approval**.

The *Documents Awaiting Approval* screen appears, displaying all documents currently waiting to be approved.

About the Documents Awaiting Approval Log

The Documents Awaiting Approval Log is an automatically generated log that displays a complete list of all documents currently waiting for the approval of one or more users before being published in the Document Library.

Documents Awaiting Approval Log

The log includes the following information:

This column	Includes this information
Title	The name of the document Click the link to display the document's details on the *Document Inspection* screen
Folder	The location where the document is stored in the Document Library
Approval Needed By	The username(s) of the user(s) who have been selected to approve the document *Some documents may not require the approval of all displayed users*
Date	The date and time the document was added to the Document Library

This column	Includes this information
Actions	The **Override Approval** and **Cancel Publishing** buttons Click the buttons to approve or reject the document; for more information, see "Managing Document Approval Routing" in Chapter 3, page 31

Document History Report

The Document History Report provides BTRS administrators with a method to review the history of documents in folders you can manage. Each document is listed by folder, and includes a link to each version of the published document. In addition, the name of the user who published the last version of the document, as well as the date and time the document was published, is included for each document.

To read more information about the details included in the report, see "About the Document History Report" on page 100.

▸ **To generate a Document History Report**

1   On the BTRS navigation bar, click **BTRS Admin**.

    The *BTRS Admin* screen appears.

2   Under Reports and Logs, click **Document History Report**.

    The *Document History Report* form opens.

If the folder you want to select does not appear, next to the list, click **Refresh Folder List**.

3   In the list, select the folder that contains the document(s) for which you want to view version history.

4   Select **This Folder Only** to view only those documents in the folder you selected.

    – or –

    Select **All Subfolders** to view documents in this folder and all subfolders.

5   Click **Submit**.

    BTRS generates the report and displays the results on the screen.

About the Document History Report

The Document History Report provides version history information for documents in one or more folder(s) you select to view. The report enables you to view versions of each published document, and additional information including who published the version, and when.

Document History Report

If the document is checked in and has not yet been published, BTRS displays the message, "No version history for this document" next to the document name.

The log contains the following information:

This area	Includes this information
Folder path	Location of the folder that contains the documents displayed in the report (displayed above document title in left pane)
Document title	Name of the document (displayed in bold in left pane), and document's file name (displayed under document title)
Version	Last published version of the document, and date and time it was published Click the link to view that version of the document
User Name	Name of the user who published the document
Comments	Text entered by the user in the **Version Comments** field on the *Document Inspection* screen

Document Totals Log

The Document Totals Log displays the total number of documents within the Document Library that match criteria you enter. In the log, you can choose to view all documents stored in folders you have permission to view; the number of documents last published by each user (regardless of permissions); and/or the number of documents assigned to each category.

▶ **To generate a Document Totals Log**

1   On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2   Under Reports and Logs, click **Document Totals Log**.

The *Document Totals Log* form opens.

☑ View By Folder ☑ View By Category ☑ View By User

View

3   Select one or more of the following options:

Select this option	To see these results
View By Folder	The number of documents stored in each folder Only documents in folders you have access to appear in the total count
View By Category	The number of documents assigned to each category
View By User	The number of documents each user was last to publish Only published versions of documents appear in the total count

4   Click **View**.

BTRS generates the log and displays the results according to the options you select.

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BTRS Admin Menu ▼ | Home |

New Save Print

By Folder (Total: 39)

Folder	Document Count
..DOCUMENTS	0
..DOCUMENTS/COUNTY AND LOCAL GOVERNMENT	5
..DOCUMENTS/FOCUS AREA A WORKGROUP	2
..DOCUMENTS/FOCUS AREA B WORKGROUP	10
..DOCUMENTS/WORKGROUP PROTOCOLS	4
..DOCUMENTS/WORKGROUP PROTOCOLS/ANTHRAX WORKGROUP	13
..DOCUMENTS/WORKGROUP PROTOCOLS/SMALLPOX WORKGROUP	2
..DOCUMENTS/WORKGROUP PROTOCOLS/WEST NILE VIRUS WORKGROUP	3

By Publisher (person who last modified the published documents)

Publisher	Document Count
STATEHAN\bmanly	23
STATEHAN\kcarpenter	42
STATEHAN\mhuffman	20

By Category (Total: 38)

Category	Document Count
../EMERGENCY SERVICES	8
../AGENTS OF BIOTERRORISM	24
../BTRS TRAINING	6
../HEALTH ADVISORIES	0

Document Totals Log (all criteria displayed)

Modified Content Report

The Modified Content Report enables BTRS administrators to view the most recent publishing information for each document within a particular folder. The report includes the name and location of the document, the name of the user who last published the document, and the date and time the document was published.

To read more information about the details included in the report, see "About the Modified Content Report" on page 103.

▶ **To generate a Modified Content Report**

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* screen appears.

2 Under Reports and Logs, click **Modified Content Report**.

The *Modified Content Report* form opens.

If the folder you want to select does not appear, next to the list, click **Refresh Folder List**.

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3   In the list, select the folder that contains the documents for which you want to view publishing history.

The report includes documents in all subfolders you have permission to view as well.

To view all the documents published in a particular folder, leave the **Documents published after** and **Documents published before** fields blank.

4   In the **Documents published after** field, type or select the date on or after which the document was published.

Click the calendar icon next to the field to view and select from dates on the calendar.

5   In the **Documents published before** field, type or select the date on or before the document was published.

Click the calendar icon next to the field to view and select from dates on the calendar.

6   Select one of the following sorting options:

Select this option	To sort results by
Folder	The folder in which the document resides
Author	The name of the user who last published the document
Date Modified	The date and time the document was last published

7   Click **Submit**.

BTRS generates the report and displays the results in the method(s) you select.

About the Modified Content Report

The Modified Content Report displays the documents that have been modified and republished to the Document Library. The report provides the name of each document, the location of that document in the Document Library, the name of the person who last modified the document, and when the document was last modified.

Modified Content Report (sorted by folder)

The report contains the following information:

This column	Contains this information
Title	The name of the document
Folder	The location where the document is stored in the Document Library
Modified By	The username of the person who last published the document (in domain/username format)
Date Modified	The date and time the document was last published

Folder Reports

BTRS provides you with a report to monitor the permissions and approval routing set for each folder in the Document Library. Each BTRS administrator can generate a Folder Permission Report to review information for each folder he or she can view in the Document Library.

Folder Permission Report

For more information about permission levels for folders in the Document Library, see "Working with Folder Permissions" in Chapter 3, page 23.

The Folder Permission Report enables BTRS administrators to review the folder permissions and approval routing set for folders in the Document Library. As long as you have at least Reader permissions for a folder, you can view permissions and approval routing for that folder in the Folder Permission Report.

▶ **To generate a Folder Permission Report**

1 On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* screen appears.

2 Under Reports and Logs, click **Folder Permission Reports**.

   The *Folder Permission Report* form displays.

If the folder you want to select does not appear, next to the list, click **Refresh Folder List**.

3 In the list, select the folder that contains the documents for which you want to view reent publishing history.

4 Select **This Folder Only** to view only those documents in the folder you selected.

   – or –

   Select **All Subfolders** to view documents in this folder and all subfolders.

5 Click **Submit**.

   BTRS generates the report and displays all modified documents in the folder(s) you select.

Folder Permission Report (folder and subfolders displayed)

License Reports

BTRS provides a method for BTRS administrators to track the number and type of licenses assigned within the BTRS portal. You can generate the License Count Log at any time to view the number of licenses assigned by license level.

License Count Log

For more information about assigning licenses, see "Creating Users" in Chapter 6, page 77.

The License Count Log is an automatically generated log that provides data for each type of BTRS user license assigned in the portal. The number of licenses displayed includes those for all users in the User Directory, regardless of your management rights.

▸ **To generate a License Count Log**

  1   On the BTRS navigation bar, click **BTRS Admin**.

       The *BTRS Admin* screen appears.

  2   Under Reports and Logs, click **License Count Log**.

       The *License Count Log* screen appears, displaying the number of each type of license assigned.

BTRS Admin Menu ▾	Home

Alerting Licenses: 4

BTRS Admin Licenses: 21

BTRS Collaboration Licenses: 3

Glossary

A

active alerts Alerts that have been sent and have not yet expired based on set.

alert A notification sent to inform or warn roles within the BTRS directory.

alert details All details of a sent alert, including the alert's sender, subject, message, priority, send time, expiration, and roles notified.

alertable roles A role designated by a BTRS Administrator to receive alerts from a particular role or role group.

author A user who has permission to add, edit, delete, or read all documents in a folder. Authors can also create, rename, and delete folders, but cannot set folder security policies. In an enhanced folder, authors can also submit any document for publishing.

B

best bet A document property that designates a document as highly relevant to a specific category or keyword search.

BTRS Admin A BTRS user with broader permissions to manage portal content and settings, as well as roles, role groups, and users. In addition, BTRS Admins can generate and view various administrative reports and logs.

BTRS System Administrator A user who has permission to set up, configure, and maintain servers; manage server resources; create and update indexes; and control security at the top level of the workspace.

C

categories Groups of related content, organized hierarchically by subject matter.

category folder A folder that is used by coordinators to organize categories.

check in Add or return a document to an enhanced folder. Releases the editing reservation on a document, allowing others to open and edit it. See also **check out**, **enhanced folder**.

check out Create a writable version of a document while preventing other users from editing the same document. See also **check in**, **enhanced folder**.

D

dashboard See **digital dashboard**.

dashboard site A Web site created by using Digital Dashboard technology. The dashboard site contains a number of pages, or dashboards, and includes customization pages and custom Web Part forms. The dashboard site is used to distribute information to workspace users through a Web browser. See also **digital dashboard**, **Web Part**.

default version The version selected when a particular version is not specified.

depth A measure of folder enumeration depth, such as how many links to follow from the content source. See also **scope**.

digital dashboard A page on a dashboard site. Each dashboard contains a collection of Web Parts in a modular view that can be presented to users in a Web browser. See also **dashboard site**, **Web part**.

directory The collection of Organizational Units (OUs) and the roles within those OUs.

discussions A feature for adding threaded remarks about a document.

document A discrete unit of content and its associated metadata. See also **file**.

Document Library The storage location for documents in the workspace. See also: **documents folder**.

document profile A set of properties applied to similar documents.

documents folder A folder used to store documents in the workspace.

E

enhanced folder A document storage folder that supports document management tasks such as check-in, check-out, versioning, approval, and publishing.

F

folder A means of organizing and storing programs, files, and documents on a disk or server.

folder tree A hierarchical display of folder organization.

full-text search Search of documents, document properties, and content through the use of full-text search predicates. See also **search**.

K

keywords A list that represents terms a user might enter in a search form. These terms can be organized into optional hierarchies to help organize them more effectively.

M

metadata The properties associated with a document. Metadata can be system-defined, such as file size or modified date, or user-defined, such as author or title.

multi-valued A property that can hold more than one value. See also **property value**.

My Profile Information about individual users that can be updated by those users.

O

Organizational Unit (OU) A container that holds objects. Typically, an organization will create OUs that resemble their organizational structure, maintaining an OU for each department.

P

permission(s) Authorizations within the portal, which determine access to documents/ sections in the workspace. The three standard permissions are: Reader, Author, and BTRS Admin.

profile (portal) Information about individual documents that are uploaded into BTRS. The profile information is attached to the corresponding documents and aids in searches. See also **My Profile**.

property An element of metadata for a document profile. Each document profile has multiple properties. Properties can be system-defined, such as file size or creation date, or can be user-defined, such as title or keywords. See also **metadata**.

publish To make a document available to Readers. See also **approve**.

R

rank The relevance of a file to a search query.

Reader A user who can search for and read documents but cannot add them to the workspace. By default, all folder users have Reader permissions. In an enhanced folder, Readers can only view folders and published versions of documents. A Reader cannot check out, edit, or delete workspace documents, nor view draft document versions.

roles A position within an Organizational Unit (OU) that is able to be notified. One or more users can be assigned to a role.

S

search The functionality of finding information in documents based on keywords found in the text of those documents or related to the properties of the documents. This is commonly referred to as full-text search. See also **index**.

standard folders Support document profiles, but does not support check in, check out, publishing, or document version history.

subscription A request for notification when changes are made to a document, the contents of a folder, a category, or a search results list.

U

undo check out Cancel the check-out of a document. Undoing a check out returns the document to the state it was before the check out.

V

version history The (reverse) chronological listing of revisions that have been made to an item, and any associated comments attached to the version by the user performing the check-in or check-out.

W

Web part A customizable, reusable component used to display specific information on a dashboard. Web parts are used to associate web-based content (such as XML, HTML, and scripting) with a specific set of properties in an organizational framework. See also **dashboard site**, **digital dashboard**.

workspace An organized collection of documents, content sources, management folders, categories, document profiles, subscriptions, and discussions. It provides a central location to organize, manage, and publish content.

Index

O

Organizational Units

about 38
assigning managers to 49, 75
creating
    for roles 46
    for users 72
managing 58
modifying
    for roles 46
    for users 72
moving
    in Role Directory 47
    in User Directory 73
role-based 45
user-based 71

OU. *See* **Organizational Units.**

P

permissions

assigning application rights to
  roles 56
modifying for folders 25
setting for folders 23, 24
to create role groups 57
to grant management rights to
  roles 57
to manage alert settings 57
to publish content on BTRS
  home page 57

portal content

announcements 11
categories 16
news 8
quick links 14

publishing

content on the BTRS home page 57
unapproved documents 31

Q

quick links

adding to home page 14
deleting 16
managing 13
modifying 15
permission to publish 61

R

reports

about 32
Alert History Log 94
alert-based 94
Basic User Report 87
Blast Fax Report 92
Directory Extract 89
Document History Report 99
Document Totals Log 101
document-based 96
Documents Awaiting Approval Log 97
Documents Checked Out Log 96
Folder Permission Report 104
folder-based 104
License Count Log 106
license-based 106
Modified Content Report 102
user-based 87

Role Directory

about Organizational Units 38
about roles 39
assigning managers to
  Organizational Units 49
creating
    directory structures 43
    Organizational Units 46
    roles 53
modifying
    Organizational Units 46
    roles 62
moving
    Organizational Units 47
    roles 48
viewing role details 65
working with Organizational Units 45

Role Group Directory

about role groups 41
creating role groups 67
modifying role groups 69
viewing role group details 70

role groups

about 40
adding roles to 68
assigning managers to 67
assigning to roles 56
creating 67
modifying 69
permission to create 57
viewing details 70

V

viewing